Document Control & Records Management: Best Practices Course

23 – 27 August 2027
Toronto (Canada)



Document Control & Records Management: Best Practices Course

Ref: 3156_135751 **Date:** 23 – 27 August 2027 **Location:** Toronto (Canada) **Fees:** 6600 GBP

Why This Course

In today's information-driven world, organizations must manage their data, records, and documentation with accuracy, consistency, and compliance. The Document Control and Records Management Program is an intensive 1-week course designed to equip professionals with the practical skills and strategic insight required to manage organizational information assets effectively.

Participants will explore best practices in document control, records retention, regulatory compliance, and digital transformation. The program integrates global standards, hands-on exercises, and case studies to prepare attendees to design, implement, and maintain robust document and records management systems that support operational excellence and governance integrity.

What You'll Learn and Practice

By completing this program, participants will:

- Understand the key principles and frameworks of document control and records management.
- Design and implement effective document lifecycle management processes.
- Ensure compliance with legal, regulatory, and organizational requirements.
- Utilize digital platforms and enterprise systems for efficient information management.
- Apply best practices for organizing, securing, and retrieving records.

The Program Flow

Day 1: Foundations of Document Control and Records Management

- Introduction to document control and records management principles.
- Regulatory landscape, international standards, and compliance requirements.
- Document lifecycle management: creation, approval, storage, and archiving.
- Roles and responsibilities in information governance.

Day 2: Document Control Processes and Best Practices

- Document creation, review, and approval workflows.
- Version control, change management, and document traceability.
- Naming conventions, metadata, and classification systems.
- Document distribution protocols and access control measures.



Day 3: Records Management Strategies

- Records classification schemes and retention schedules.
- Managing physical and electronic records effectively.
- Legal holds, audits, and e-discovery processes.
- Secure and compliant records disposal and destruction.

Day 4: Digital Tools and Systems

- Overview of Document Management Systems DMS and their functionalities.
- Electronic Records Management Systems ERMS and their integration.
- Cloud-based and hybrid solutions for document control.
- Leveraging Enterprise Content Management ECM platforms.

Day 5: Implementation and Continuous Improvement

- Developing and documenting policies, procedures, and governance frameworks.
- Training, user adoption, and change management strategies.
- Internal auditing, quality control, and performance measurement.
- Emerging trends: automation, AI, and digital transformation in records management.

Individual Impact

- Gain the expertise to design and implement a compliant document control system.
- Improve efficiency and accuracy in document handling and retrieval.
- Strengthen knowledge of compliance, auditing, and data security requirements.
- Enhance career prospects in information governance, compliance, or administration.

Organizational Impact

- Establish consistent, transparent document management processes.
- Ensure regulatory compliance and reduce risks related to data retention and privacy.
- Improve operational efficiency through standardized document workflows.
- Support digital transformation and knowledge management initiatives.

Training Methodology

This program combines theoretical frameworks with applied practice through:

- Interactive workshops on document lifecycle and digital systems.
- Case studies from industries including energy, construction, and healthcare.
- Group projects on developing document control procedures.
- Practical demonstrations of DMS/ERMS tools and integrations.



Beyond the Course

Upon completion, participants will be equipped to develop, implement, and sustain world-class document control and records management systems that ensure accuracy, compliance, and efficiency across all business operations.

Graduates will emerge as information governance professionals — capable of managing critical organizational knowledge in both digital and physical environments.

