

# ELECTRONIC & HR POLICY TRAINING, CONSULTING & EXPERT WITNESS SERVICES

## Experience & Expertise

The ePolicy Institute™ is the world's leading electronic and HR policy training and consulting firm. We provide onsite and online training, policy writing, and expert witness services to clients worldwide. From Alabama to Abu Dhabi, clients rely on the ePolicy Institute to help maximize compliance and minimize risks through the implementation of best practices-based email, web, mobile device, social media, record retention, and other electronic & HR policies. Global clients include government agencies such as the United States Department of Defense, multinational corporations including Mitsubishi Motors, legal entities such as the Federal Bar Association, and educational institutions including The Ohio State University. In addition, Microsoft, Symantec, Yahoo, and other tech giants have hired the ePolicy Institute to educate users in the US, UK, EU, Australia, Canada, and Asia about electronic and HR risks, records, policies, and best practices. The ePolicy Institute is a division of Nancy Flynn Public Relations, Inc., a woman-owned small business (WOSB) founded in 1988.

## We Help You Recognize and Reduce Risks

- Lawsuits
- Regulatory Fines
- Record Mismanagement
- E-Discovery Disasters
- Security Breaches
- Miscommunication
- Media Scrutiny
- Ruined Reputations
- Wasted Resources
- Lost Productivity
- Damaged Careers

## Expert Witness Services

Trusted for her integrity and knowledge, ePolicy Institute Founder Nancy Flynn serves as an expert witness in policy-related litigation for the federal government and law firms.

## Respected National Surveys

Since 2001, the ePolicy Institute has collaborated with American Management Association, *US News & World Report*, and others on highly respected surveys of workplace policies and monitoring.



## TRAINING TOPICS:

### Seminars, Webinars, Keynotes

- Writing Effective & Compliant Email
- Writing & Implementing Effective Electronic & HR Policies and Procedures
- Electronic Business Records: 7-Step Strategy for Effective & Compliant Record Management
- Electronic Compliance Rules, Records, Policies & Best Practices for Email, Internet, Mobile & Social Media
- Developing Effective Email, Social Media & Mobile Device Policies to Manage Behavior, Mitigate Risks & Maximize Compliance
- Mobile Device Risks, Records & Compliance Rules: Managing Strategic BYOD Policy
- Social Media Risks, Records, Policies & Procedures
- Monitoring Employees' Work-Related & Personal Social Media Legally and Ethically
- Netiquette Rules: Writing Civil, Compliant, Conversational Email

### Healthcare Topics

- HIPAA Compliance: What Healthcare Providers Need to Know About EPHI & Paper Medical Records
- How HIPAA Impacts Email & Texting: Communicating Compliantly with Patients & Peers
- Electronic Business Records: 7-Step Strategy for Managing Email, EPHI & Business Records

### Financial Topics

- Maintaining Compliant FDIC Records, Including Related Email & Social Media Retention Rules
- Managing E-Sign, E-Statements & E-Disclosures
- Avoiding the Top 10 Legal & Compliance Mistakes in the E-Statement Process
- Writing & Implementing Effective and Compliant E-Disclosures

## MAJOR CLIENTS: PAST PERFORMANCE

**GOVERNMENT:** US Dept. of Defense, Federal Trade Commission, World Bank, DC Water & Sewer Authority, State of New Mexico, Ohio Dept. Transportation, Ohio Electronic Records Committee

**EDUCATION:** Ohio State University, University of Pittsburgh, Columbus City Schools, Ohio Association Secondary School Admins, The New School

**CORPORATE:** Mitsubishi Motors R&D of North America, Universal Studios, Limited Too, TransAlta, Hy-Tek Material Handling

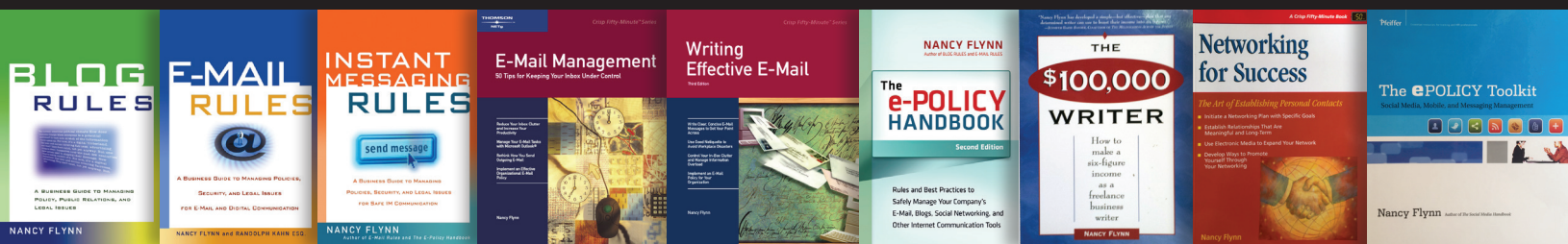
**HEALTHCARE:** OhioHealth, Cardinal Health, Smith & Nephew, Analog Devices, Ontario Hospital Assoc., United Healthcare, Healthcare Systems, Hospitals, Hospices, and Homecare Providers Nationwide

**TECHNOLOGY:** Microsoft, Symantec, Yahoo! Canada, RPost, Vaporstream, Iron Mountain, Akonix, Cintas, ArcMail, MessageLabs

**FINANCIAL SERVICES:** Nationwide Insurance, Crowe Horwath, OCC, Waha Capital, West LB Bank, Assurex Global, MA Bankers Assoc, Ohio Bankers League, Banks & Credit Unions Nationwide

**ASSOCIATIONS:** SHRM, ARMA, IAAP, World Airlines Customer Relations Association, AL Bankers Assoc., Indiana Healthcare Assoc., Property Casualty Insurers of America

**LEGAL & LAW ENFORCEMENT:** Federal Bar Association, Ohio Supreme Court, Ohio Juvenile Detention Directors, Ohio Assoc. Court Administrators, American Bar Assoc., City, State, and Federal Bar Associations



**Nancy Flynn Wrote the Book on Workplace Policy, Communication & Compliance**

## NANCY FLYNN

### ePolicy Pioneer, Author, Expert Witness



Nancy Flynn is an industry pioneer. In 2001, she founded the ePolicy Institute, the world's first electronic policy training, consulting, and expert witness firm. That year saw the publication of her book *The e-Policy Handbook*, the first to provide rules and best practices for the management of email and other electronic messaging tools.

In a glowing review, *Training* magazine said, "You might not find a more useful business book this year, or next, than this one." In 1998, Nancy Flynn wrote *Writing Effective E-Mail*. The first book to

address electronic writing, it now is in its third edition. Nancy Flynn has written 13 books published in six languages: English, Chinese, German, Russian, Vietnamese, and Spanish. Her titles include *The ePolicy Toolkit*, *The Social Media Handbook*, and *E-Mail Rules*. Trusted for her integrity and knowledge, Nancy Flynn serves as an expert witness in policy-related litigation for the federal government and law firms. A go-to media source, she often is in the news. Nancy Flynn has served as an adjunct faculty member at Ohio State University, where she pursued a Ph.D. in English.



### For a Quote, Contact Nancy Flynn

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## COMPANY DESIGNATIONS

- Corporate Name: Nancy Flynn Public Relations, Inc.
- DBA: The ePolicyInstitute™
- DBA: Business Writing Institute™
- DUNS: 933029808
- CAGE Code: 66LY9
- Woman-Owned Small Business
- For-Profit Corporation
- Established 1988
- Incorporated 1992
- All Major Credit Cards Accepted

## NAICS CODES

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|--------|---|
| 611430 | Professional & Management Development Training            |
| 541611 | Administrative Management & General Management Consulting |
| 541612 | HR Consulting Services                                    |
| 541613 | Marketing Consulting Services                             |
| 541820 | PR Agencies   |
| 561410 | Document Prep Services                                    |
| 711510 | Independent Artists, Writers & Performers                 |