

Practical Experiences in EDRM Implementation

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Many EDRM failures

What do I mean by failure?

- Underused by the organisation
- Added to IM environment, not consolidated
- Expended more resources than planned
- Widely disliked at the user level
- *When a difference exists between the strategic intent and outcome given planned resources.*

Implementing EDRM is *complicated*

- Technology can be complicated
- Data migration is complicated
- Developing policy & process is complicated
- Managing a diverse project team is complicated
- Many stakeholders across organisation
- Limited experience across stakeholders
- Few positive role models from like organisations
- Senior 'management by exception' only

But don't despair...

...there are simple things that can be done:

- Understand that technology is not #1
- Keep the project goals 'modest'
- Manage unrealistic expectations
- Ruthlessly manage scope creep
- Learn what you can from others, understanding the limitations of their experience

Matthew's tips & tricks

- Migrating paper files
- Migrating e-mail & network drives
- Business processes for corro & e-mail
- How to automate business processes
- How to manage stakeholders
- Transition from project to running system

Migrating paper files

- What do we mean? *Good question!*
- Migrating metadata – models & mapping
- So when do we start scanning?
- Do we tidy before or after?
- What about the process?
- Spend effort on paper but goal is electronic?
- Training and timing of cutover
- File plans and folder hierarchies

Migrating e-mail & network drives

- Folder hierarchies and security models
- What comes first – DM or RM?
- Managing transition - from low to high risk
- Training and cutover
- User positive reinforcement - carrot
- User negative reinforcement – stick
- Monitor compliance – treat proactively

Business processes - corro & e-mail

- How do we treat incoming corro?
 - Register to file upon receipt?
 - Register and distribute physically?
 - Scan, register and distribute electronically?
- How about outgoing corro?
- What about e-mail?
 - Policy
 - Duplication

How to automate business processes

- Rarely implemented and rarely done well
- Workflow is no panacea - process must be designed for automation:
 - Product *designed* for mass production
 - Possibilities for customisation very limited
 - Nauseating level of detail required
 - Ambiguity must be eliminated
 - Expensive BP engineering required
- E-mail can give similar outcome at low risk

How to manage stakeholders

- Be trustworthy
- Have a clear policy & implementation plan
- They are the customer - understand their point of view
- Requirements expressed as manifestations
- Frequent communication - eliminate or manage disjoint between stakeholders
- Know that you cannot please everybody

From project to running system

- ‘Project completion remorse’ common:
 - Project personnel find it hard to let go
 - Users feel abandoned
 - Management loses interest
- Key personnel in project & running system
- Running system must be documented
- Running system must be resourced
- Post-implementation review 12mo later

Summary

- Implementing EDRM can be hard
- Keep scope simple & achievable
- Manage unrealistic expectations
- Learn & filter the experiences of others
- Have fun