COOKIES & CONVO

Today @ 12:30pm

9 Records Management Project Pitfalls
and How to Avoid Them

#ARMALive2018

collabware

Pitfall #9

No Mandate for Implementation

- Find a executive champion
- Communicate to the top levels
- Endorse the project publicly

Pitfall #8

File Plan is overly complex

- Find the balance between fine detail and bigger buckets
- Focus on Retention
- Assess risk and simplify where possible

Pitfall #7

Bite off more than you can chew

- Pilot, Learn, Refine
- Repeat until done
- Engage the vendor during implementation and rollout

Pitfall #6

The vendor will just take care of it

- Own the project
- Allocate personnel for key roles
- Vendor as partner – mixed team

Pitfall #5

Once and done rollout

- Develop progress measurements
- Monitor results and measure adoption
- Find out what works and apply to what's not working

Pitfall #4

Search/Find requirements ignored

- Ask users how they get at their stuff
- Use all the tools in the search toolbox
- Provide pre-emptive results lists (surface content)

Pitfall #3

Once size fits all

- Adapt approach to the situation
- Provide value to the end user area, don't get in their way
- Consider "Compliance Lite"

Pitfall #2

Dismiss or Minimize End User Concerns

- Engage end user reps early and often
- Identify impacts on their work process and demonstrate listening
- Allow time for modifications/improvements

AND NOW PITFALL #1

ARE YOU READY?!

Pitfall #1

Too many user decisions

- Automate Classification
- Automate Declaration
- Minimize mandatory metadata

9 Pitfalls to Avoid

1. Too many user decisions
2. Dismiss end user concerns
3. A one size fits all design
4. Search/find requirements omitted
5. Once and done rollout
6. Taking a Vendor does everything approach
7. Biting off more than you can chew
8. File Plan is overly complex
9. No Mandate for Implementation

Questions?