

**THE PROBLEM**

- Information silos
- Ad hoc use of IM systems
- No data or document management standards
- Inadequate communications internally and externally
- IM & ICT non-aligned
- No accountability for IM

**WHAT DID WE DO**  
IM Strategy focus areas:

- Governance
- Planned IM activities
- Training & change management
- Lifecycle management
- Quality framework
- Consolidation

**CRITICAL SUCCESS FACTORS**

- Alignment with business objectives
- Governance
- Focus on critical issues while remaining strategically-oriented
- Achievable and practical goals

Company X is a medium-sized company with a large overseas parent company and off-shore operations. Fast and effective communication of information between these entities is critical to the Company's operations. The Company must operate within and comply with a complex State and Federal regulatory environment.

The Company holds significant and valuable engineering data assets that are critical to both ongoing operations and future expansion. Fundamentally these data assets are the lifeblood of the company and as such are essential to its ongoing viability and future profitability.

The Company is in the execution phase of a major capital project. During this phase, vendor data and all engineering and vendor documentation must be finalised and verified. This execution phase has been subject to numerous delays that have severely impacted the project schedule and therefore the Company's financial bottom line and to some extent its business credibility. Most of these delays can be attributed to inadequate project management, ineffective document control, no data governance or data management standards and lack of any consistent and effective approaches to the way data and documents are managed both within the project and throughout the organisation in general.

Given the significance of the Company's data, document and knowledge assets in terms of underpinning safe and viable operations and future growth and profitability, the extent of issues in relation to the management of these assets will severely impact the Company if not addressed. These issues include:

- No consistent approaches or documented procedures—individuals or work groups determine how their data and documents will be managed.
- No over-arching responsibility or accountability for data and document management
- No ability to authenticate source data
- No security for key data assets
- No data management standards
- No standards being applied to document management
- No documented business processes
- No records management capability
- Communications systems and practices internally and externally inhibit information exchange and the sharing of specialised technical knowledge
- Inadequate security arrangements for highly sensitive and confidential hard copy documents
- No alignment between ICT and document control departments
- Ad hoc and inconsistent use of ICT systems, leading to fragmented and duplicated information across the DMS, network drive and other business systems

In essence, Company X has a very low level of information management maturity and capability when assessed against best practice models, and the fundamental purpose of the IM Strategy is to enable the company to progress towards optimised information management maturity and capability over a period of time. In these circumstances, where there is so much that needs attention in terms of information management, the IM Strategy focused initially on business-critical issues through six focus areas:

- Governance and Accountability
- Planned rather than reactive approach
- Training, skills development and change management
- Identifying and adopting standards-based, best practice approaches—for example, establishing criteria for what data to collect, and how to store, manage and use that data
- Developing standards and quality control mechanisms for producing high-quality information
- Establishing systems and processes to consolidate data and information assets and share those assets across the organisation.

Each of these focus areas was broken down into programs of work to be undertaken within specific timeframes over a two-year period. The Strategy also articulated key performance indicators, risks and risk mitigation approaches, and resource requirements.

These six key focus area were translated into a program of work, and a detailed plan was developed to guide strategy implementation.

**FOCUSING ON STRATEGIC SOLUTIONS**