

Quick IM Review



WHAT CAN YOU DO TO QUICKLY REVIEW YOUR ORGANISATION TO ESTABLISH WHETHER IM ASSETS/ INVESTMENTS ARE DELIVERING ANY BUSINESS BENEFIT TO THE ORGANISATION?

 STEP 1**Establishing if Business Benefit is or is not being delivered**

- Establish whether staff store documents in multiple places, i.e.
 - Network drives
 - Outlook folders
 - Electronic Document/Records Management System
 - Line of Business Systems
 - Online Systems
 - In hard copy files
- Establish whether the documents discussed above are duplicated across many of the places listed above or are these documents stored in one place only and linked elsewhere across the organisation, such as across databases?
- In addition, do you often hear staff saying that they cannot work out exactly where to store/find their documents?
- Establish whether staff are readily and easily able to access the correct version of required documents, if not do you often hear things such as, *I cannot tell which version is the correct version of a document*

 STEP 2**Finding the answers**

To find the answers to any of the above questions consider issue a very short online survey to either all staff or staff representatives of the organisation's major business processes or functions.

If a survey is unsuitable to the situation or the organisation, then consider running focus groups with the business owners and staff involved in two of the organisation's key business processes or functions which support its strategic direction.

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Analysing the answers

You may discover that:

- Documents are duplicated and stored in multiple places across the organisation, and
- Versions are uncontrolled, and
- Staff do not know where to find some documents

If one or all of the points above exist then it is pretty clear that your IM Assets/Investments are not delivering the required benefit to the business.



Achieving Business Benefit from IM Assets/Investments

The following will assist the organisation to achieve business benefit from its IM Assets/Investment:

- Develop a brief (simple and straightforward) Information Management Strategy and Implementation Plan which is aligned to the strategic direction of the organisation and focuses on the organisation's critical or key business processes and functions only. The Implementation Plan will address some of the operational issues indicated as a result of addressing the questions in Step 1.
- Update or develop an Information Governance Policy and associated Guideline.
- Identify one or two key business processes and have them fully analysed to establish where information and documents are used as inputs and outputs of the business process, and where they are stored. From there redesign the business process to ensure that it is optimised and makes efficient use of technology, and of information and documents.
- Ensure that all IM initiatives are fully supported by Business Cases which clearly and accurately justify the expenditure of funds or resources.
- Ensure that all IM initiatives are aligned with the IM Strategy and Implementation Plan.

