

HEALTH CHECK

RECORDS & DOCUMENT MANAGEMENT



By ensuring that your organisation is effectively and efficiently creating, capturing, searching and retrieving, sharing, archiving and disposing of records and documents, you can significantly reduce your operating costs.

DO YOU NEED A HEALTH CHECK?

1. Are inefficiencies in your Records and Document Management processes, tools and systems impacting work and business performance?
2. Are your staff spending too much time searching for documents?
3. Do you want to make better use of your office space or thinking of moving to new premises?
4. Are you experiencing issues with managing an ever increasing number of e-mails?
5. Do staff members distrust the existing recordkeeping tools, systems and practices and create multiple copies and versions of documents?
6. Have important documents or files been lost or accidentally destroyed?
7. Is inducting new staff in the organisation's recordkeeping tools, systems and practices a lengthy process?
8. Would you like to have an induction process that helps staff understand the value of records and documents to the organisation?
9. Do you have recordkeeping compliance issues that are not being addressed?
10. Do you have a requirement for improved recordkeeping to meet reporting and auditing purposes?

An answer of YES to one or more questions indicates that running a Records & Document Management Health Check would make excellent business sense for your organisation.



OVERVIEW

To achieve good practice in Records and Document Management, your organisation needs a Health Check to determine your current performance.

To do this, Experience Matters runs a thorough review of your current recordkeeping environment, taking into account your business drivers and strategic goals.

The process establishes the importance of Records and Document Management in your organisation and focuses attention on the efficiencies and cost reductions that could be achieved by improving your recordkeeping tools, systems, practices and resources.

Experience Matters then produces a report on how you are tracking against agreed benchmarks and recommends improvements.

(continued next page)

HEALTH CHECK

RECORDS & DOCUMENT MANAGEMENT

(continued from previous page)



HOW IS IT DONE?

In conducting a Health Check, Experience Matters assesses your current Records and Document Management practices through a discovery process, which can include:

- Analysing documentation such as annual reports and strategic plans to identify your organisation's strategic goals and objectives and ensure our recommendations align with these. We also assess any existing policies, procedures and other documentation relating to document and records management.
- Seeking input from staff and nominated contractors in a vertical and horizontal cross-section of the organisation with representation from all its business units
- Staff surveys (paper-based and/or online)
- Workshops and focus groups
- One-on-one interviews
- Direct observation

We then document the findings and present them to senior management.

DELIVERABLES

Experience Matters will provide you with the following materials so you can plan your next steps:

- A communication plan and draft communication pieces for the entire exercise
- An assessment report, identifying current records and document management practices
- A roadmap with recommendations for improvement

BENEFITS

A Health Check is a very rapid, extremely smart, collaborative discovery process that maps and assesses your organisation's current situation.

A Health Check gathers baseline performance information and allows your recordkeeping tools, systems, practices and resources to be compared to agreed benchmarks, identifying any gaps and indicating where further investigation and planning needs to be undertaken.

A Health Check engages all your staff in the improvement process from the outset by drawing on the knowledge and expertise of people right across your organisation. Their ideas and insights for improvements, potential obstacles and challenges are key inputs into the process.

A Health Check draws the attention of senior decision-makers to any significant risks and issues that currently exist and helps to build the case that "something needs to be done!"

A Health Check helps you secure resources and initiate improvement projects.

CLIENTS

Experience Matters has successfully delivered Records & Document Management Health Checks for State and Local Government agencies and private sector organisations. Clients include ABB Grain, Origin Energy, City of Marion, SA Tourism Commission, Port Kembla Port Corporation and WorkCover SA.

