

Realising benefits from investment in Document and Records Management:

strategies and tactics to support the adoption of Electronic Document and Record Management projects

Dates: 21 March, 13 June 2006

Price: £ 550

The EDRM challenge:

Numerous organisations, driven by regulatory and legal requirements, have invested significant sums on electronic systems to manage their documentation and records. Yet few have realised any incremental benefit from such investment. Most should now be able to trace documents more easily hence satisfy the basic requirements of regulators but are unlikely to have built on the investment and brought about improvements in the way their organisation works and shares its information and knowledge.

How has the challenge arisen?

Over the past decade the volume of electronic documents has increased by a factor of 25 while the number of filing clerks has reduced by 95%. It has become common practice for employees to save documents and email messages to their personal drives and folders. At the same time email and instant messaging have blurred the boundaries between formal and informal communication. All of this has encouraged a belief that information is a personal possession rather than an organisational asset.

The personal filing systems that now prevail for both electronic and hard copy documents often have little or no organisation. Insofar as they work at all, they do so only for the individuals who created them. So it is hardly surprising that according to a **study commissioned by Shell, employees spend 60% of their time just looking for information.**

An EDRM system is the technical solution to this problem. Implementing the technology can be expensive and challenging but organisations have found that EDRM systems work technically. **Their biggest challenge is getting people to use the technology.** Technophobia and inadequate IT skills may account in part for the lack of take-up and can be tackled with effective training.

The biggest obstacle, though, is that **implementing an EDRM system requires an organisation to recognise that changes in working practices are a prerequisite to success.**

And that is the problem. People typically resist change and “organisational culture” is frequently cited as the biggest stumbling block. **A failure to clearly identify achievable benefits and an inclination to over-state potential efficiency gains often compound that resistance.**

How this workshop will help you meet the challenge?

This one day highly interactive workshop will explore how you can identify and introduce processes to help make your EDRM project successful. It will be targeted at your individual needs, allow ample time for debate and focus on these themes:

- EDRM and Process - handling core process mapping and file structures
- EDRM and Space - addressing relocation and changing work practices
- EDRM and Culture - changing personal habits and responsibilities



Drawing on experience gained from a decade of effecting change across a wide range of global and domestic organisations your moderators will help you to:

- understand the cultural change and support required to develop an EDRM system
- design and set up the initial change programme in parallel with your technology project
- use every step in a change programme to achieve multiple results, and so amplify the value of the effort
- source and foster communities whose support is vital to catalyse and sustain changed work habits
- develop the role of documents as dynamic interfaces or workspaces which contribute actively to the change programme
- be alert to the major risks tensions that need managing, as well as the day-to-day repair work, which is inevitable in a complex and unstable environment.

The workshop will comprise presentations, experimentation and discussion. **You are encouraged to come armed with a list of your challenges and be willing to contribute your experience.** We aim to present you with new ideas and approaches to take back to your organisation to help you realise incremental value from the considerable investment you've made or are about to make on an EDRM system.

Your Moderators:

The workshop will be moderated by Associates from Sparknow augmented by case studies from prominent industry practitioners who have undertaken projects that have tackled behavioural and cultural change and recently implemented EDRM in their organisations. Sparknow has an extensive client list in the public and private arena including in the UK BBC, Cabinet Office, Countryside Agency, DEFRA, DTI, HMRC, various Health Trusts and Centres and an array of financial services institutions such as EBRD, UBSW and Schrodgers. International clients include Swiss Development Corporation, Islamic Development Bank and International Labour Organisation.

Paul J Corney, Principal CorneyCo and Information and Knowledge Advisor to the BMS Group, is a frequent speaker / moderator on the information and knowledge circuit and a member of the Expert Advisory Committee of 'Online'. He will act as the workshop chair.

Victoria Ward, Founder Sparknow, and one of the thought leaders in the change and knowledge management arenas will act as moderator for the interactive sessions with

Philip Gibson, a communications specialist with extensive experience in changing behaviours and working practices of "blue chip" organisations through face-to-face engagement.

Who should attend?

If you are about to introduce, have introduced or are responsible for regulating an organisation introducing an EDRM project, then this workshop will be of interest to you. It will be of specific value to **those involved in an active role in the implementation and delivery of EDRM projects** and those with a wider strategic objective of **improving information and knowledge sharing** in their organisation: these are likely to include **sponsors, business and Information Technology /Information Systems directors and managers, information and knowledge managers.**



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- 21 March 2006
- 13 June 2006

Registration Fee

One day seminar, £ 550 + VAT

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The registration fee for the event covers the following: Attendance, copy of the documentation, lunches and light refreshments. Accommodation is not included, but reduced rates have been negotiated. Please contact UNICOM Seminars for details. Detailed delegate information will be sent to you approximately two weeks before the event. Payment should be sent with the registration form or at the latest, paid at the event. All invoices carry a 10% surcharge which is payable if the fee remains unpaid on the day of the event. What happens if I have to cancel? Confirm your CANCELLATION in writing up to 15 working days before the event and receive a refund less a 10% + VAT service charge. Regrettably, no refunds can be made for cancellations received less than 15 working days prior to the event and the invoice will remain due. UBSUBSTITUTIONS are welcome at any time. You may also TRANSFER your booking to a future event for a small additional charge of £125/person/day, payable within one week of invoice. As we cannot guarantee that exactly the same course will be available, the transfer will be open to any other event taking place within six months from the date of the original event. The organisers reserve the right to amend the programme if necessary. INDEMNITY: Should for any reason outside the control of UNICOM Seminars Ltd, the venue or the speakers change, or the event be cancelled due to industrial action, adverse weather conditions, or an act of terrorism, UNICOM Seminars Ltd will endeavour to reschedule, but the client hereby indemnifies and holds UNICOM Seminars Ltd harmless from and against any and all costs, damages and expenses, including attorneys fees, which are incurred by the client. The construction validity and performance of this Agreement shall be governed by all aspects by the laws of England to the exclusive jurisdiction of whose court the Parties hereby agree to submit.