

Keys to a Successful Records Management Implementation

One Firm, One Place for Records

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Information
Governance
Peer Group

Agenda

1. WorkSite Records Manager (WRM) Implementation Process:
 - a. Step 1: Establish an Information Governance Policy
 - b. Step 2: Promote a Centralized Managed Solution
 - c. Step 3: Implement WorkSite Records Manager (WRM)
 - d. Step 4: Deploy and Support WorkSite Records Manager (WRM)
2. New End User Functions: Request for Delivery and FileParts Creation
3. One Firm, One Place for Records
4. How did we do it?
 - a. Strategic Project Organization
 - b. Defined Project Deployment Schedule
 - c. Communication Strategy
 - d. Training/Support Strategy
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WorkSite Records Manager (WRM) Implementation Process



Implementation Process

Step 1: Establish an Information Governance Policy

- “Policies are foundations for new system implementations.”
- Information Governance Policy establishes the lifecycle for all client and business operations information regardless of media type (paper or electronic).
- Promotion and socialization lead to approval of the Information Governance Policy and Retention Schedule in 2012.
- Key Policy Areas:
 - Retention Period Starts at Matter Close Date
 - Retention Periods are set by Practice Group

Implementation Process

Step 2: Promote a Centrally Managed Solution

- Collect, Identify, Review & Communicate System Requirements across all Practice Groups and Offices.
- Communicate to all Practice Groups New Procedures and new Electronic and Physical Folder Selections early on.
- Tie new system Information Governance Policy.
- Continually promote benefits of new system to key stakeholders.
 - Centralized Management of Physical Records
 - Application of Retention Policies
 - Mechanism to Request Delivery of Existing File Parts
 - Tracking of All File Parts



Implementation Workflow Process

Step 3: Implement WorkSite Records Manager (WRM)

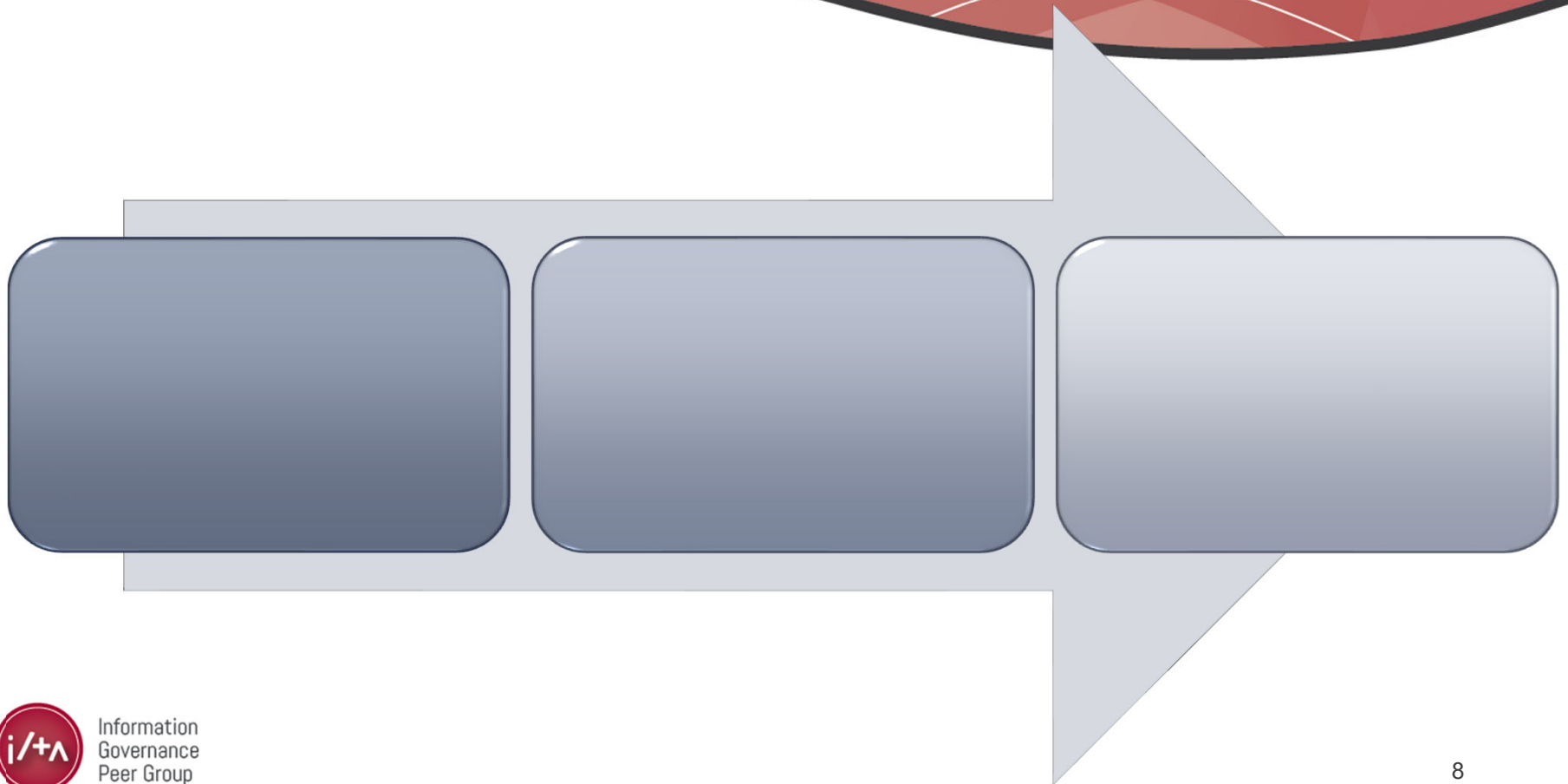
- Preliminary Data and System Planning
- Establish all System Environments: Test/Training/Production
- Conduct Data Mapping
- Build Migration Scripts and Test Conversions (alpha/delta)
- Conduct Post Conversion Data Validation
- Legacy Data Clean up
- Design and Configure WRM
 - Label Redesign
 - Set Built-in Workflow Process with Template Metadata Specific to each Practice Group.
- Test Configured Application
- Package and Deliver new Application to Users
 1. **WRM Standard** for all End users
 2. **WRM Professional** for Information Governance staff

Implementation Process

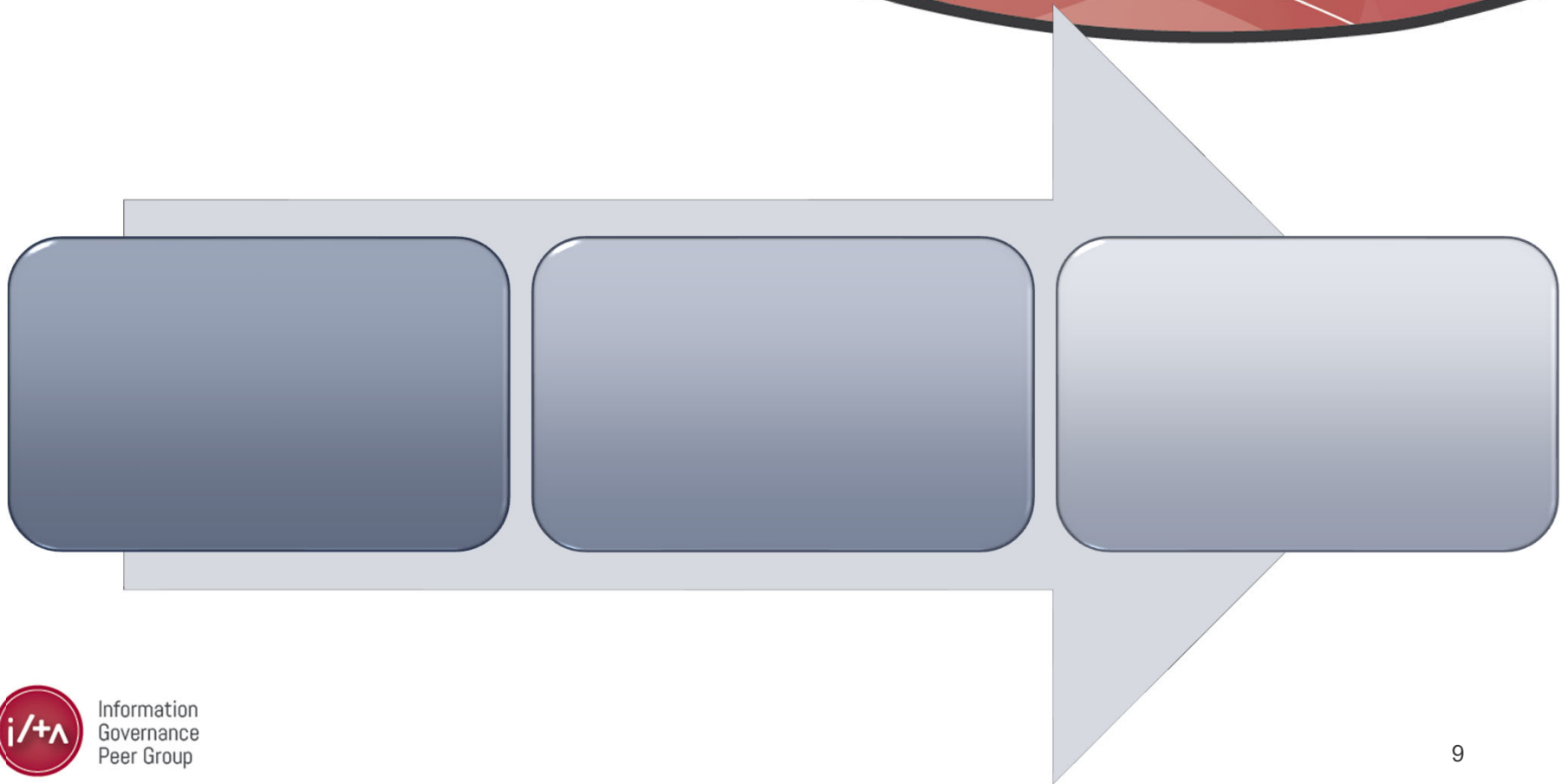
Step 4: Deploy and Support WorkSite Records Manager (WRM)

- Establish a Realistic Deployment Schedule
- Establish a Communication & Training Plan
- Build Training Documentation
- Ensure Sufficient Resources are allocated for Training and Floor Support
- Deliver Training Prior to Each Office Migration
- Provide Floor Support after Each Office(s) Migration

New End User Functions: REQUEST FOR DELIVERY

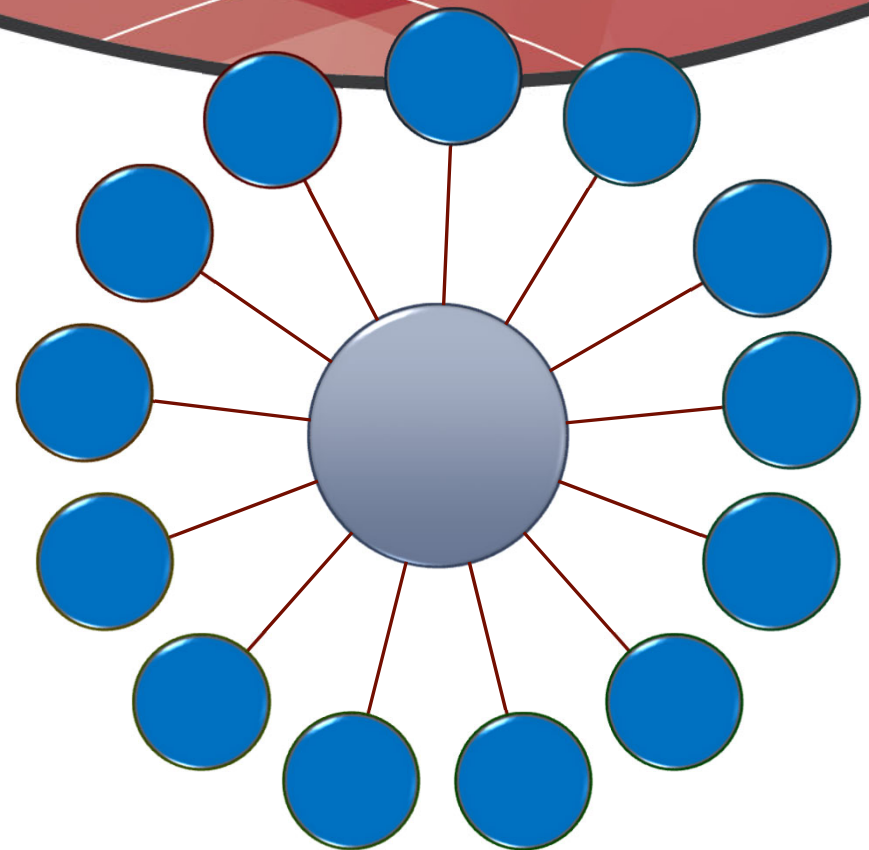


New End User Functions: FILE PART CREATION



One Firm, One Place for Records

- 80% complete with successful migrations Firm wide.
- 7 Offices and more than 450 successful WRM installations completed.
- WRM usage by administrative staff reaches as high as 97% in Washington DC.
- End User Testimonials:
 - "I like the fact that it is easier to search and retrieve files and reports." – Boston Secretary
 - "I really like the reference material." - NY Corporate Secretary
 - "I find it to be user friendly." - NY Trial Secretary
 - "I find it very simple and easy to use. The instructions are easy to follow and I've been able to go in and do what I need to do with no problems." – WDC Secretary, Health Industries Advisory



How did we do it?

1.Strategic Project Organization

- Project is organized following proven project management methodologies.
- Dedicate full time Information Governance (IG) Resources in key project phases: System Design, System Testing, Data Validation, Workflow Process.
- A small “Task Force Team” with member from IG, Training & Technical teams was established to assist with designing and testing WRM.
- Design and Testing Workshops are key to keeping project momentum.
- Cross-functional resources such as Training and Customer Support departments can be leveraged for deployment. Helps ensure that consistency is kept during deployment.
- **“Change” starts from within Information Governance.** IG has to buy into the new system before they can sell it to others including end-users.
- Information Governance is the main and key Agent of Change for WRM.

How did we do it?

2. Defined Project Deployment Schedule

- Create a realistic Deployment Schedule. Keep it simple!
- Depending on the location and size of the offices, deployment plan can be organized by region or time zone.
- Project Deployment Schedule follows Data Migration.
- Keeping the balance between length of time to migrate data from old to new system & local support resources available to assist end users post conversion is key.
- Obtain approval on the Project Deployment Schedule and communicate it to the core and extended teams.

How did we do it?

3. Communication Strategy

- Heavy Emphasis on Communication at all Project Phases:
 - Established a Marketing Strategy with a Trademark for all communication:



- Set up weekly Meetings with Project Team (IG, IT/Training teams)
- Set up bi-weekly Executive Project Meetings
- (T-4 Weeks) Promotional meetings with each office (Local Senior Management: (Office Administrators, Secretarial Managers, Local IT, Local IG).
- (T-3 Weeks) Welcome to WRM Standard email announcement to the office.
- (T-3 Weeks) Training Promotion of WRM Standard.
- (T-2/3 Weeks) Training classes.
- (T-1/+1 Weeks) Floor Support, training labs with focus on Searching in WRM Standard.

How did we do it?

4. Training/Support Strategy

- Training is made mandatory for all administrative staff and optional for all Attorneys.
- Training classes are 1 hour in length.
- Training is hands on and conducted in each office's training room locations.
- Training videos on key functionality are made available during the time that training classes are offered.
- Training labs are offered prior to go-live or right after to assist users with key functionality.
- Floor Support is scheduled starting the Monday after the migration weekend in each of the offices.

Project Implementation Recommendations

- Do Not make System Decisions in isolation. Involve key stakeholders early on in the System Design and Workflow Process.
- Not “everyone” in the project team has been part of a system deployment. Continued education on project methodology, process and procedures is recommended.
- Take the project temperature often.
- Create a realistic deployment schedule and keep it simple.
- Communication, Communication, Communication!.....Heavy emphasis on communication at all levels is recommended. Both within the internal teams, cross functional team and user community.

Q & A

Contact Information

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