Preservation of Corporate Information
Lightning Talk

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PresQT, 2017

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SFGATE   LOCAL   NEWS   SPORTS   BUSINESS   A&E   FOOD   LIVING   TRAVEL   REA

Company initiates frantic search of its records to try to prove lines are safe ahead of deadline

By Kevin Fagan   Published 4:00 am, Saturday, March 5, 2011

http://www.sfgate.com/news/article/PG-E-launches-huge-paper-chase-for-pipeline-data-2457018.php

The general Content Management Plans I recommend to my clients consist of the following parts:
- Culture
- People
- Process
- Systems
- Audit and Control

I also take other considerations into account

Culture

Try to disrupt workflow as little as possible

People

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- People may be the most important part of the content management process.
    - They do the work.
    - They save the documents.
    - They look for documents.
    - People can make or break a system. My approach is to work with people by taking their thoughts and ideas into consideration.

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People

Most Importantly:

People have to know and feel that their ideas are heard and that their specific needs are noted and addressed at the process moves along.

Process

- Silos, repositories and essential sources of content
  - include those located outside of the organization.

Process

- Content required
    - When it is needed
    - Desired format
    - How it must be made available for the department or team to accomplish its objectives.

Systems

- Review all systems, silos and tools currently in place
    - Document and discuss problems

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Systems

- Review all systems and tools currently in place.
- Review perceived strengths and weaknesses
  - Meet with people
  - Survey users – may need to target specific users if tool is specific

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Systems

Vendors
- Talk to vendors
  - Will vendors of entrenched tools can make changes to make products work in a way that furthers the goals of organization?
  - Collaborate with them to adjust tools to meet new needs

Systems

The Google Drive, DropBox and Box Problem

- Review new systems in which stakeholders are interested.
    - How do they work with existing silos?
    - Compatible with existing silos?

    If you use Open Science Framework, you can resolve some issues around different

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Systems

- Identify where content is cross departmental and access is needed by groups with otherwise different needs

Systems

- Review taxonomies
  - Existing internal
  - Commercial
  - Consider usage and how well they are functioning

Audit & Control

Controlling and auditing the process is very individual to the culture of the organization.

- Familiarize yourself the legal and regulatory requirements for retention of materials
- Work with people in affected departments to make sure that required materials are being retained, where they are being retained, who has access, etc.
- Applies to Legal and HR Depts, but may also apply to other departments because of patents, related information on your products, etc.

Allies in Audit, Legal, Security, HR and in other departments are important in this effort.

Other Considerations

Can Blockchain technology circumvent some of the records management requirements?
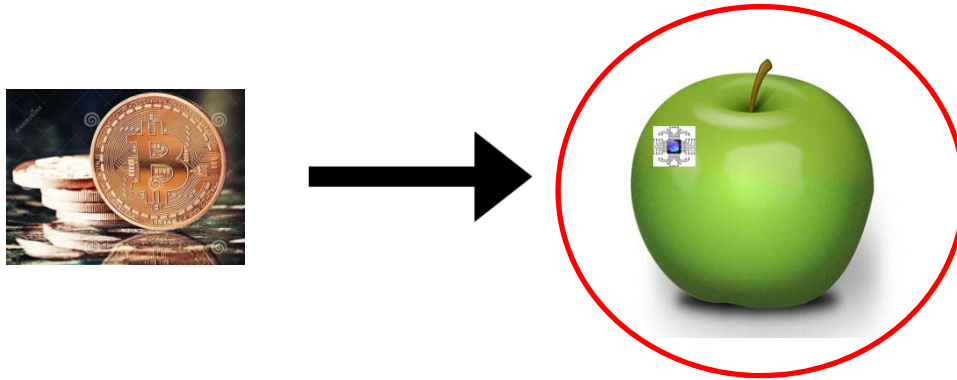

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Bitcoin: http://bit.ly/2oO0BpC

Other Considerations

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Other Considerations

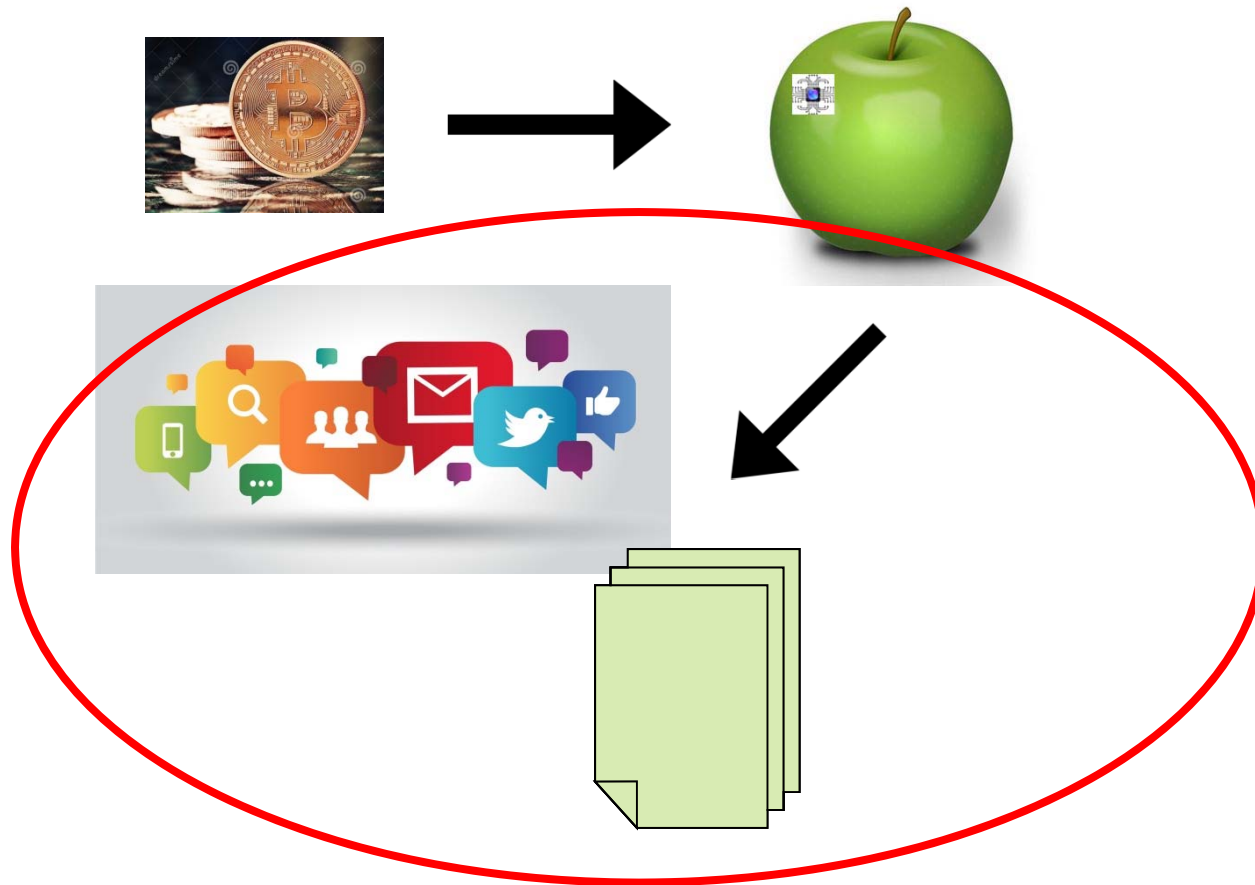Can Blockchain technology circumvent some of the records management requirements?

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More Considerations

- Disaster planning
- Hardware and software plan
- Governance plan
- File Plan
- Archives
- Records Management
- Informatics (human-computer interaction)
- Challenges
  - Information, content, data have no voice. They need a champion if they are not to be ignored
- Value
  - It is easier to manage your intellectual property if you know what you have and where it is.
- Succession planning
  - One example: in the event of an employee leaving. Their access should be completely revoked. It should spiral out from HR to IT and any other departments.
  - Other aspects to succession planning should also be addressed.

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- Think about how your ideas and tools can help your colleagues who are not here today

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- Think about how your ideas and tools can help your colleagues who are not here today
  - Great opportunity to get together with people from other environments to collaborate
  - Know the most common software. Don't rely on 'obscure' or academic centric technology. Most law firms, for example, don't run Unix

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- Know the lingo. Do you know what KPI means? Are you familiar with the use of metrics in a law firm environment?

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- Build repository agnostic tools
- Build tools that plug into common software

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- Consider the cost of transactions/touches. The higher the cost, the less likely a corporation will be to purchase
  - Needs an interface that requires only oversight not constant tweaking
  - Auto metadata nudging or generation

Thank you!

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