



# Webinar: A Large-Scale Government Digital Transformation Case Study



*Part of the ARMA Canada Connects Series*

[www.gravityunion.com](http://www.gravityunion.com)

# Housekeeping

1. Use the Q/A panel to ask questions or share comments
2. The recording and presentation will be sent after

# What we'll cover today

- ✓ Introductions
- ✓ Provincial Government case study
- ✓ Top 5 mistakes with ECM/RM projects

# Introductions



# Michael Schweitzer

President and CEO

- ✓ 15 years of enterprise technology experience
- ✓ Microsoft and Collabware certified
- ✓ Collabware MVP recipient
- ✓ Finalist, Information Governance Expert of the Year 2017
- ✓ Vancouver Office 365 user group board member
- ✓ ARMA Canada guest speaker
- ✓ Collabware User Group Board Member
- ✓ SharePoint Saturdays guest speaker
- ✓ Over 100 SharePoint ECM projects completed



# Jas Shukla

Director of Strategy

- ✓ 15 years experience in enterprise technology consulting
- ✓ Previously with Microsoft on the SharePoint product team
- ✓ 10 years as a consultant designing employee portals and apps
- ✓ Collabware user group board member

# Who we are

**Canadian** compliance-inspired services firm helping organizations on their digital transformation journey

Gold Certified

Collabware Partner



Gold

Microsoft Partner



# Industry Expertise

Gravity Union works with organizations across Canada and the US to transform organizations with SharePoint and Microsoft/Office 365 coupled with Collabware CLM, Collabspace or Microsoft 365 Security and Compliance.



Federal and Provincial Governments



Municipal Governments



Healthcare



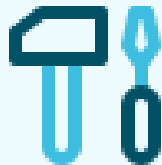
First Nations



Insurance



Energy and Utilities



Engineering and Construction



Banking and Finance



Regulatory Bodies



Transportation





# Quick Facts

**50+**

Years of combined  
Collabware  
experience

**10,000+**

Users using our  
SharePoint and  
Office 365 solutions

**40+**

Microsoft  
certifications

**25+**

Collabware and  
CollabSpace projects

**10+**

Years of average  
SharePoint  
experience across  
our team

**18**

Collabware Certified  
Consultants

**50+**

Million documents  
migrated and  
managed in our  
solutions

**100%**

Project success rate

# Case Study

# Project Overview

Background

## Quick Facts

Industry  
**Government Services**

Number of Knowledge workers  
**800+ users in 50 departments at head office**

Field workers  
**~3200 employees in distribution and retail**

Revenue  
**1.08 Billion**



# Provincial Agency

- The provincial agency is one of the largest distributors and retailers of alcohol in Canada, generating a net income of approximately **\$1 billion**
- Has a workforce of approximately **4,000** full and part-time employees
- Operates **197** retail stores
- Role of wholesaler to approximately **700** private liquor retail outlets and 10,000 licensed establishments
- Sole wholesaler of non-medical **cannabis** in the province
- A unique **government** entity that operates with similar independence to a Crown Corporation under the direction of a General Manager and CEO

# Project Justification

- ✓ Rolled out an ECM platform in 2009 that was no longer supported by its vendor (**burning platform**)
- ✓ The organization was moving from one office to many offices
- ✓ The ECM server was not expected to survive the move
- ✓ Taking on a cannabis offering, increasing its needs and complexity around compliance
- ✓ Were a growing organization

# Project Parameters

- ✓ ~56 Departments
- ✓ ~600 Users (grew to 800)
- ✓ ~4 Million Documents
- ✓ ~2-3 Integration(s) with line of business systems
- ✓ ~18 Months

# Objectives

- ✓ To **standardize** on SharePoint across the organization for all content (single source of truth)
- ✓ To **classify** all content against the organization's File plan (based on provincially mandated file plan)
- ✓ To **move** all content off the current solution before the office move

# Project Team



**Project Managers**



**IT Support**



**Solution Architects**



**Change Managers**



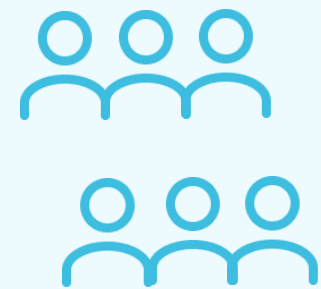
**Tiger Teams**



**Developers**



**Steering Committee**



**Records Managers**





# Project Technology



# SharePoint

SharePoint Sites

BROWSE FILES LIBRARY

THE HOPPER Policy Home Employees Policy Development PWG Projects and Issues Reference Materials Stakeholders Administration

## Policies in Progress ⓘ

Polices in Progress  
Policy Memo  
Status Reports and Tracking  
Process Maps  
Recycle Bin  
EDIT LINKS

New Upload Sync Share More

My Draft Policies All Documents Policies by Status Find a file

✓	File Name	...
<b>Policy Status : 1. Draft (7)</b>		
	2017-04-28-Policy-Information Security-DRAFT	...
	2017-05-10-Policy-Electronic Email-DRAFT	...
	IPA_Privacy_and_Access	...
	Document	...
	Test Policy document_1	...
	Test Policy document_3	...
	UAT Policy WIP SM	...
<b>Policy Status : 2. Final (3)</b>		
✓	2017-05-16-Policy- Information Security - DRAFT	...
	2017-05-16-Standard- Information Technology Security - DRAFT	...
	2018-09-20 - Covert Surveillance - FINAL	...
<b>Policy Status : 3. Published (2)</b>		
	2017-05-10-Standards-Electronic Mail DRAFT	... Tuesday at 11:24 AM <input type="checkbox"/> Jeffrey Dunbar
	Test Policy document_2	... Tuesday at 11:24 AM <input type="checkbox"/> Jeffrey Dunbar

Drag files here to upload

2017-05-16-Policy- Information Security - ... view x

SFU CONTINUING STUDIES

### Worksheet 6: *Catalytic Mindset*

Definition "Striving to proactively co-create the desired future"

**Think about yourself** and how you navigate your personal and professional life and the degree to which the Catalytic Mindset is in place for you.

I would say I apply this Mindset:

regularly as a default and matter of habit  
 sometimes, as I notice the need  
 almost never occurs to me to apply

Related to this mindset, describe how you would like to build on your strengths and/or address you areas of desired growth.

<https://ho.int5.bcldb.com/depts/Policy/PD/PIP/2017-05-16-Policy-%20In>

EDIT SHARE FOLLOW ...

# Collabware

SharePoint Sites

BROWSE FILES LIBRARY

THE HOPPER Policy Home Policies

[Policies in Progress](#)  
[Policy Memo](#)  
[Status Reports and Tracking](#)  
[Process Maps](#)  
[Recycle Bin](#)  
[EDIT LINKS](#)

[New](#)  
[My Draft Policies](#)  
[Policy Status](#)  
[Policy Status](#)  
[Policy Status](#)  
[Policy Status](#)  
[Policy Status](#)  
[Policy Status](#)

### Lifecycle Details

LIFECYCLE DETAILS

[Edit Properties](#) [Select Event](#) [Apply Event](#) [Apply Relationship](#) [Add to Hold](#) [Copy URL](#) [Reclassify Record](#) [Reverse Item State](#)

[Manage](#) [Events](#) [Relationships](#) [Holds](#) [Share](#) [Administration](#)

**Banana Bread.docx** 00000001S4

[Recipe](#) Created at 10/17/2019, 10:27 AM by qa\administrator  
[Cafeteria > Recipes > Banana Bread.docx](#) Last modified at 10/17/2019, 10:31 AM by qa\administrator

[Properties](#) [Workflow](#) [Relationships](#) [Audit](#)

Workflow	Current Stage	Workflow Status	Estimated Workflow Completion
7Y; 5Y; D - v3.0	Retain	Running	Cannot calculate date

**STAGE DETAILS**

**Retain**

**DESCRIPTION**  
 The Item will wait for the specified Retain Period. Time Period can be defined using many different calculations, including workflow events and custom date fields. To wait the full Retain Period, use the Advance to Next Action connector. Event or Content Rule connectors coming from the Retain Action are a trigger that will cut short the Retain Period when the Event or Content Rule is triggered.

[2017-05-10-Standards-Electronic Mail DRAFT](#) ... Tuesday at 11:24 AM  Jeffrey Dunbar  
[Test Policy document\\_2](#) ... Tuesday at 11:24 AM  Jeffrey Dunbar

Drag files here to upload

# Collabware

Inbox - staceyhunt@collabware.com - Outlook

FILE HOME SEND / RECEIVE FOLDER VIEW

Ignore Clean Up Delete Reply Reply All Forward Meeting IM More

Move to? To Manager Team Email Reply & Delete Done Create New

Move Rules OneNote Open Panel Copy Move

Collabmail

Search Current Mailbox (Ctrl-E) | Current Mailbox

All Unread By Date Newest

Today

- Graham Sibley  
RFP Template 12:17 PM  
Can one of you guys download this?
- Frida Larsen  
RE: Interested in the CLM for Share Point 7:19 AM  
Thanks for sending the videos.
- Sarah Gale  
Feedback on Master Test Plan Wed 3:30 PM  
Hi everyone, One of my Q2 initiatives was
- Glenn James  
Collabware CLM Demonstration Follow-up q... 5:38 AM  
Thank you for your time yesterday.

Yesterday

- Philip Cooper  
DEMO Continuation Wed 2:43 PM  
Good afternoon. Thank you again for both
- Graham Sibley  
RE: Min. of Technology, Innovation and Citize... Wed 7:39 AM  
Hi Guys, I just read through all the documents

Tuesday

Pop Out Discard

From: staceyhunt@collabware.com

To: Sarah Gale

Cc:

Subject: RE: Feedback on Master Test Plan

Attached: july02-2016\_meeting\_minutes.docx

Send

See more about Sarah Gale.

Collabmail

Project research - Quantum Allied

- july02-2016\_meeting\_minutes.docx
- production-phases.xlsx
- Quantum Allied company brochure 20...
- request-form\_2016.docx
- survey-results\_need\_discovery.pdf

New

Mail Calendar People Tasks

ITEMS: 544 UNREAD: 33 ALL FOLDERS ARE UP TO DATE. CONNECTED TO: MICROSOFT EXCHANGE 100%

# Project Philosophy

Let's dive in!

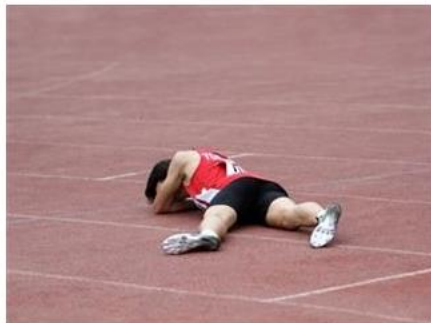


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UNION

## The 'Why' of ECM Failure and the 'How' of ECM Success

By Lane Severson | Jul 16, 2014

12 Intranet Providers That Matter Most And How They Stack Up (Re...



This past week I r...  
 Counsel and CIO...  
 increasingly rare...  
 absolutely no ente...  
 management (EC...  
 now embarking o...  
 program. This pr...  
 include rolling ou...  
 will also include a...  
 process elements...  
 technology to ser...

surprisingly, they want to get it right. They asked me: "How o...  
 successful?"

"Successful? Well, that depends on what you mean by success." That's what I started...  
 to say, I concluded that success is measured differently by different organizations, and

Based on **20 years** of industry data, we can say that nearly **50 percent** of all ECM programs fail just from a technology perspective. And of the 50 percent that succeed, **half** of those **fail** to really **provide value** to the business.

— CMS Wire

# Why?

Requires the **integration** and **coordination** of information management systems



Requires a **behavioral** change from employees

Digital transformation is primarily a **people** problem

# A novel approach to ECM



## Enablement

Maximum knowledge  
transfer



## Agility

Keeping it light, nimble  
and iterative



## User Experience<sup>2</sup>

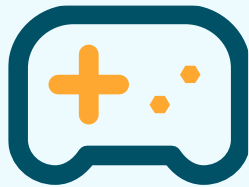
Journey + Destination



## Lean

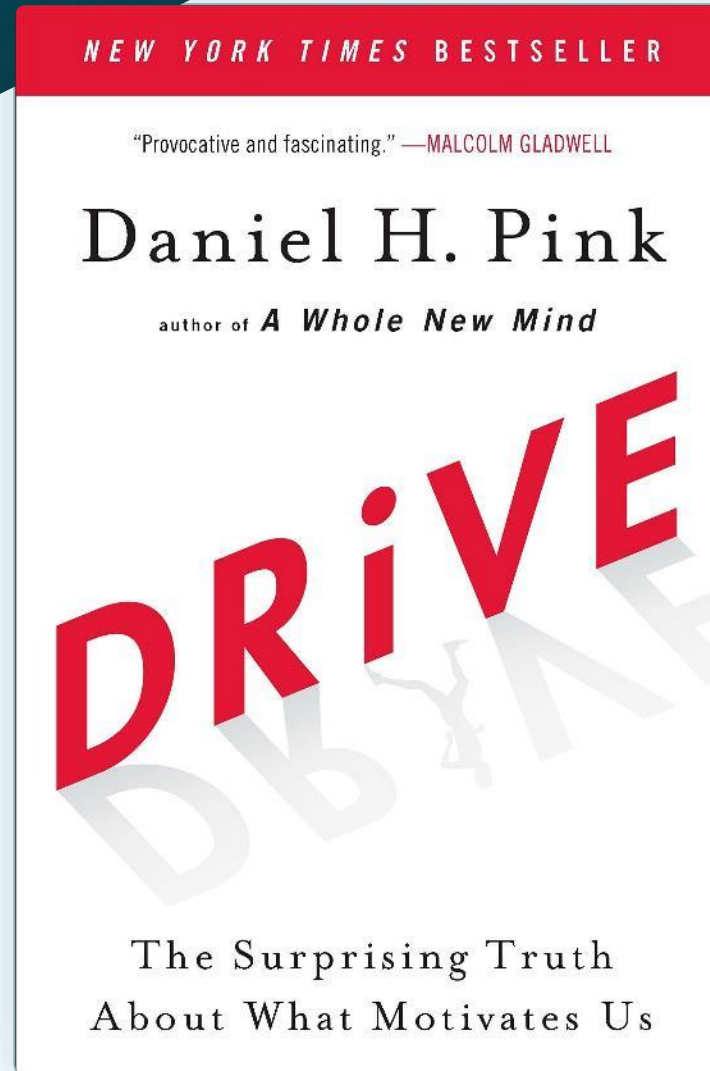
Getting to a prototype  
ASAP





## Autonomy

End-users should have control over the solution



## Purpose

The solution needs to deliver value to the end user

# Project Phases

High level overview



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UNION

# 1. Planning and preparation

Introductions, administration and housekeeping

Software and hardware procurement

Planning (project, communication, support)

Developing strategic roll-out plan



# 2. Installation, strategy and training

Installing software, training core project team

Reviewing core strategies

Reviewing process and approach

Firming up project deliverables



# 3. Pilot Groups

Testing out our process, approach and technology with designated pilot groups



# 4. Organization roll-out

Getting the rest of the departments on board

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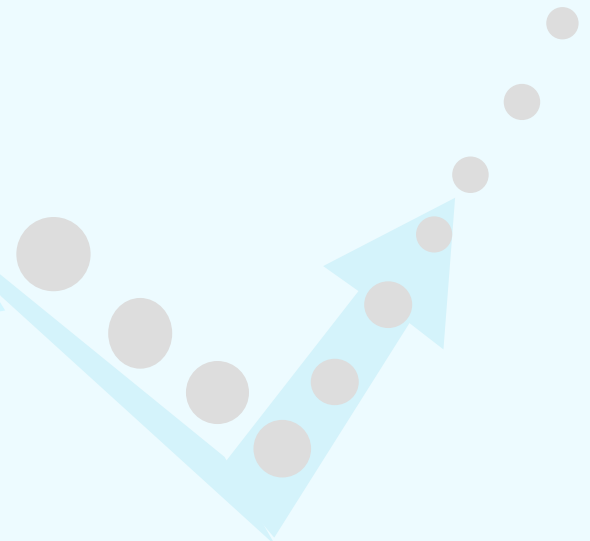
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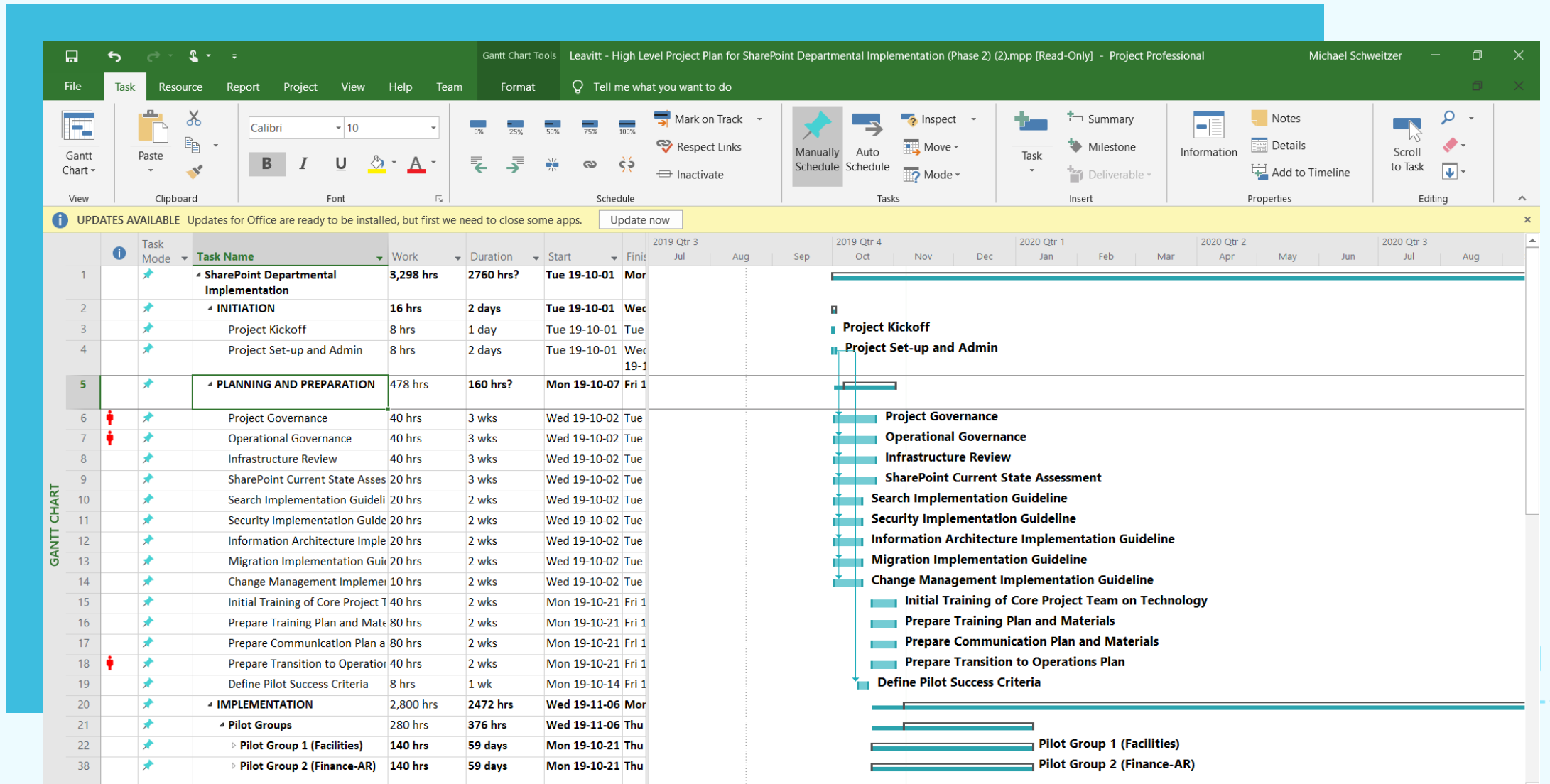
# Planning Phase

Planning and Preparation



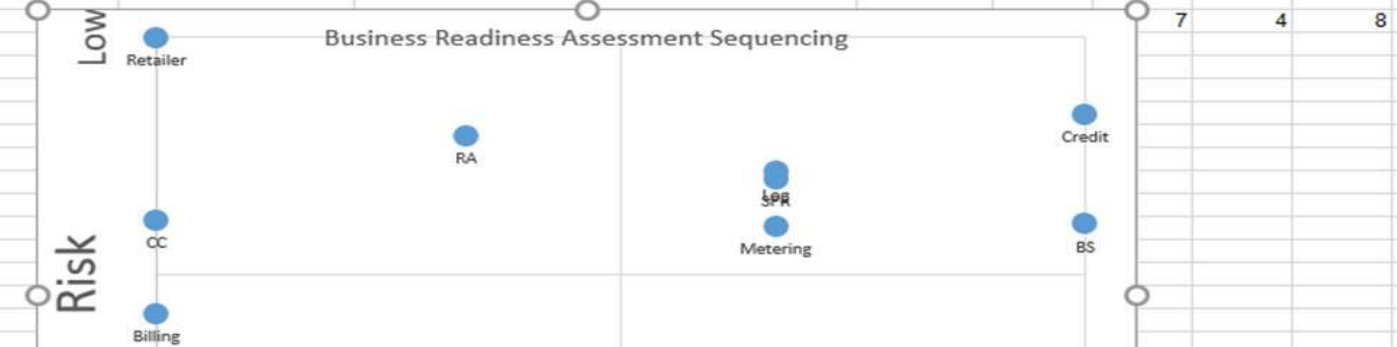
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# Detailed Project Plan



# Strategic roadmap

			Corporate Services					Customer Service					
			HR	BS	Log	RA	SPR	IT	Metering	Billing	CC	Credit	Retailer
Risks	Readiness	Current State Awareness	0	2	3	3	3	0	0	0	3	2	3
		Stakeholder Engagement	0	3	3	1	2	3	3	1	2	1	3
		Learning Development	0	2	3	1	2	2	3	1	2	1	1
	Capacity	Organizational and Environmental Considerations	0	1	2	1	2	1	2	1	3	3	3
	Willingness to Engage	Culture and Sustainability	0	1	2	2	2	1	2	2	1	1	2
		Leadership Alignment	0	3	3	2	2	3	3	2	0	1	2
	Complexity	Content Volume Status	1	1	2	1	1	1	2	1	2	1	2
		Content Quality Status	2	2	2	1	1	2	2	1	2	2	2
		Content Source Status	0	1	2	2	1	1	2	2	1	1	2
		Customizations Requirements	0	1	2	1	3	1	2	1	1	1	2
		Metadata Status	0	3	0	1	2	1	0	1	2	1	1
		Security Status	0	3	1	3	1	3	1	3	3	1	2
		Physical Objects Status	0	1	1	1	3	1	3	1	3	1	3
	Organizational Considerations	Size	1	2	3	3	3	2	2	1	1	2	1
		Location	3	2	3	3	1	3	2	3	3	3	3
		Number of Sub-Functions	1	1	1	2	1	3	2	3	2	2	2
	Additional Risks	Completion of Assessment	-10	-5	-7.5	0	-5	-10	-10	-10	-7.5	0	0
		Additional Risk	0	0	0	0	0	-10		0	0	0	0
<b>Total</b>			<b>-5.81</b>	<b>13.10</b>	<b>16.52</b>	<b>18.86</b>	<b>16.10</b>	<b>-1.14</b>	<b>12.93</b>	<b>7.19</b>	<b>13.33</b>	<b>20.29</b>	<b>25.33</b>
Benefits	People Impact	Size of Group	1	2	2	3	3	2	2	1	1	2	1
	Financial Impact	Risk Mitigation	2	3	2	2	3	3	2	2	2	3	1
		Value to Business	3	3	3	2	2	3	3	1	1	3	2
<b>Total</b>			<b>5</b>	<b>6</b>	<b>5</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>5</b>	<b>3</b>	<b>3</b>	<b>6</b>	<b>3</b>
Risk Rating			0.00	0.61	0.72	0.79	0.70	0.15	0.60	0.42	0.61	0.84	1.00
Benefits Rating			0.67	1.00	0.67	0.33	0.67	1.00	0.67	0.00	0.00	1.00	0.00



# Strategic roadmap

- ✓ Work our way from the most risk groups (size, complexity, support, capacity, ability) through to more risky groups (more, complex content, less availability, capacity to engage)
  
- ✓ **Benefits** are:
  - ✓ Team becomes more capable
  - ✓ More pre-made solutions
  - ✓ Success stories influencing down stream decision makers

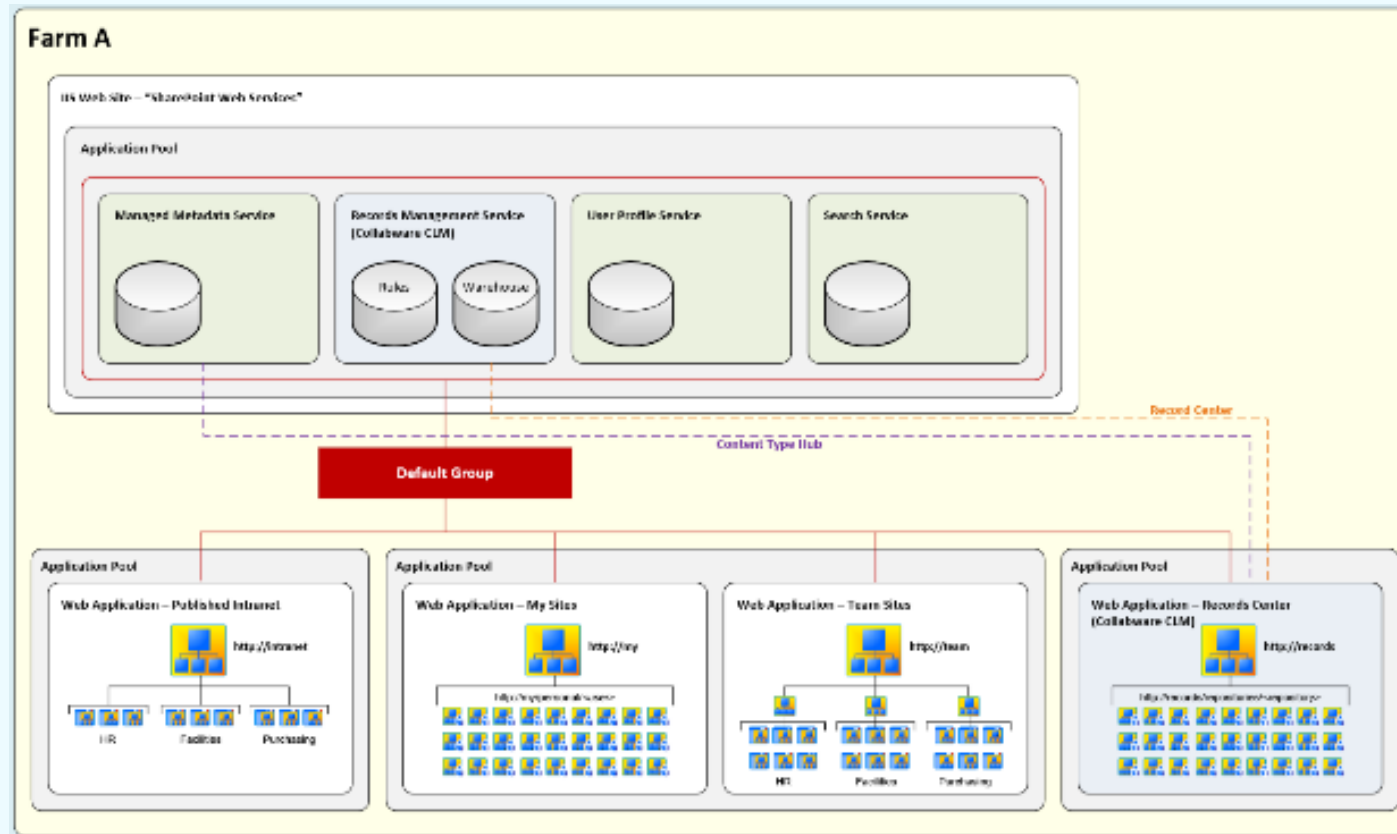




# Departmental Ordering

Schedule		SharePoint Departmental Implementation																				Size	Complexity	Effort	Scheduling Notes
Sequence Order	Scope	Team	2019			2020									2021										
			Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar					
	Planning			■	■	■																			
	Preparation			■	■	■	■																		
Pilot Group	1 Facilities	1					■	■	■													2	Low	Low	Available anytime, however
Pilot Group	2 Finance - AR Collections	2					■	■	■													11	Low	Low	Available anytime, however
	3 IT - IT Management, CRM&BI and Support	1						■	■	■	■									■		18	Low	Low	Available anytime, however
	4 HR	2						■	■	■	■										■	3	Low	Low	Available anytime.
	5 Finance - AP & Accounting	1						■	■	■	■										■	15	Low	Low	Prepare for Audit in Dec an
	6 Finance - Treasury	2						■	■	■	■										■	15	Low	Low	Prepare for Audit in Dec an
	7 Contracts Site	1									■	■	■									N/A	Low	Low	
	8 Executives	2									■	■	■									9	Low	Low	9 Executives were identifie
	9 Sales	1										■	■	■								16	Low	Medium	Lease, NE Sales Admin, UE
	10 Safety	2										■	■	■								8	Low	Medium	Available anytime. Willing
	11 Solution Design	1											■	■								4	Medium	Medium	Available anytime.
	12 Rentals	2											■	■	■					■		20	Medium	High	Available except in Oct wh
	13 Marketing - Marketing	1												■	■	■						25	Medium	Medium	Marketing team total is 25,
	14 Marketing - Data	2												■	■	■						0	Medium	Medium	Same as above (10ppl in Da
	15 Training	1													■	■	■	■		■		20	Medium	High	Available except for summ
	16 Sales - Cranes	2															■	■	■			40	Medium	High	

# Solution Architecture



# Strategy and Training

Installation, Strategy and Training

# 1. Planning and preparation

Introductions, administration and housekeeping

Software and hardware procurement

Planning (project, communication, support)

Developing strategic roll-out plan



# 2. Installation, strategy and training

Installing software, training core project team

Reviewing core strategies

Reviewing process and approach

Firming up project deliverables



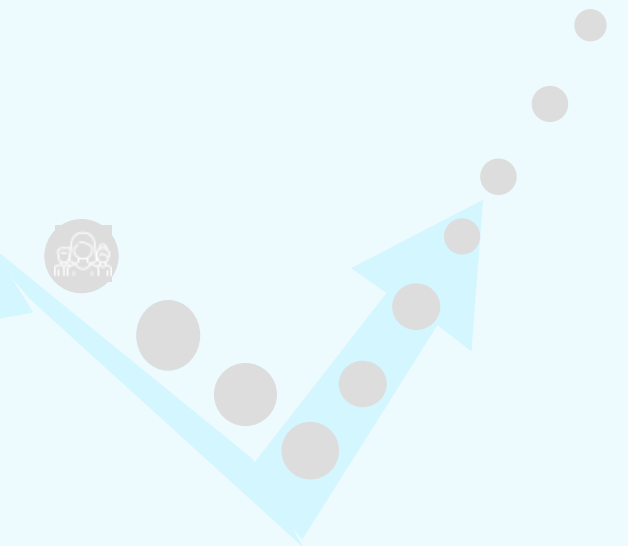
# 3. Pilot Groups

Testing out our process, approach and technology with designated pilot groups



# 4. Organization roll-out

Getting the rest of the departments on board



# Solution Install

```
Administrator: Windows PowerShell
Windows PowerShell
Copyright (C) 2015 Microsoft Corporation. All rights reserved.

PS C:\Users\Administrator> Get-service *SQL*

Status  Name                DisplayName
-----  -
Running  MSSQLFDLauncher    SQL Full-text Filter Daemon Launche...
Running  MSSQLLaunchpad     SQL Server Launchpad (MSSQLSERVER)
Running  MSSQLSERVER        SQL Server (MSSQLSERVER)
Running  MSSQLServerOLAP... SQL Server Analysis Services (MSSQL...
Stopped  SQLBrowser         SQL Server Browser
Running  SQLPBOMS           SQL Server PolyBase Data Movement (...
Running  SQLPBENGINE        SQL Server PolyBase Engine (MSSQLSE...
Stopped  SQLSERVERAGENT     SQL Server Agent (MSSQLSERVER)
Running  SQLTELEMETRY       SQL Server CEIP service (MSSQLSERVER)
Running  SQLWriter          SQL Server VSS Writer

PS C:\Users\Administrator> Get-service *SQL* | Where-Object {$_.status -eq "Running"}

Status  Name                DisplayName
-----  -
Running  MSSQLFDLauncher    SQL Full-text Filter Daemon Launche...
Running  MSSQLLaunchpad     SQL Server Launchpad (MSSQLSERVER)
Running  MSSQLSERVER        SQL Server (MSSQLSERVER)
Running  MSSQLServerOLAP... SQL Server Analysis Services (MSSQL...
Running  SQLPBOMS           SQL Server PolyBase Data Movement (...
Running  SQLPBENGINE        SQL Server PolyBase Engine (MSSQLSE...
Running  SQLTELEMETRY       SQL Server CEIP service (MSSQLSERVER)
Running  SQLWriter          SQL Server VSS Writer

PS C:\Users\Administrator> _
```

# Core Project Team Training



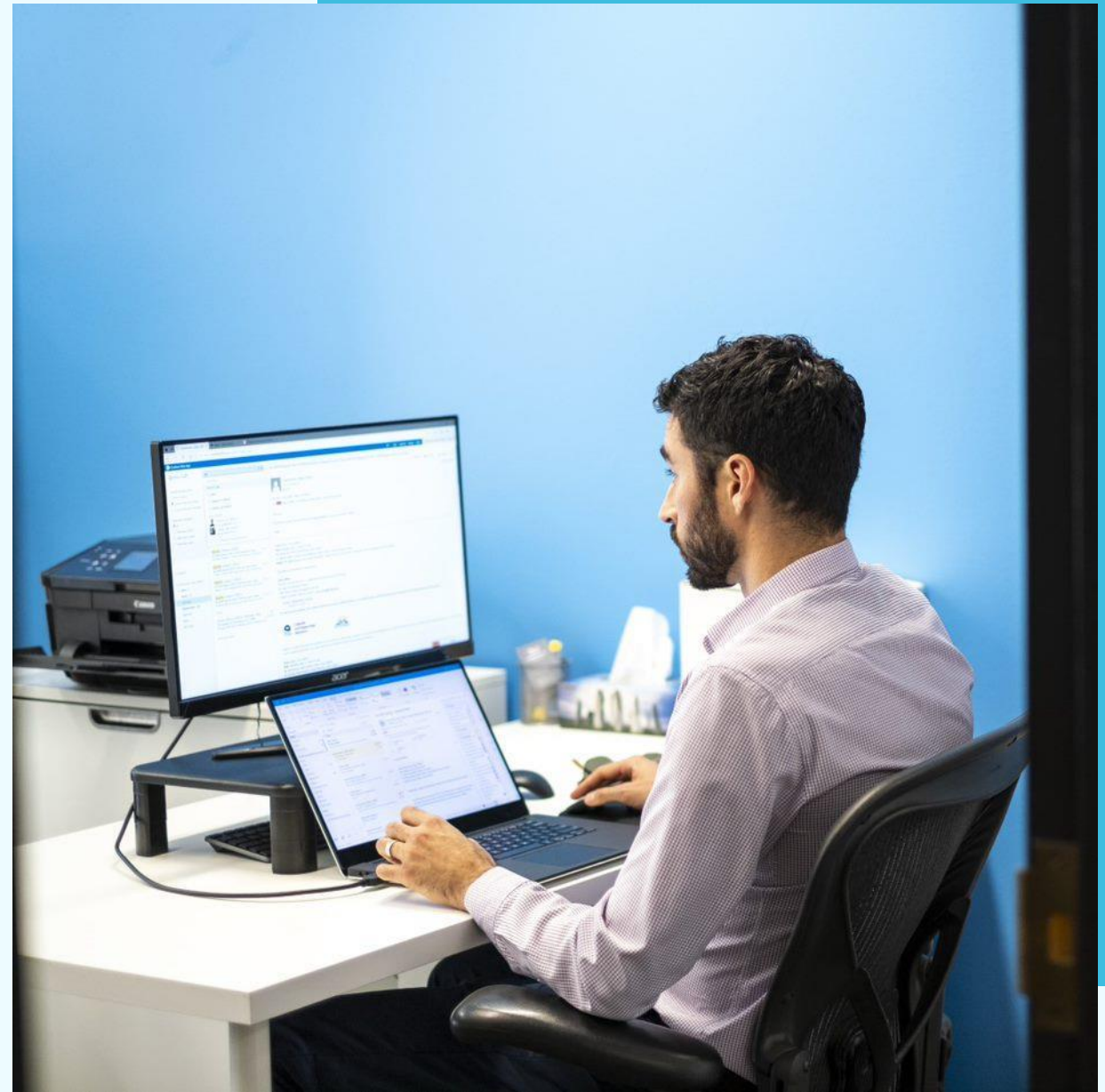
# Project Team Training

- ✓ Start process of mastery
- ✓ Support decisions in strategy



# Strategy Development

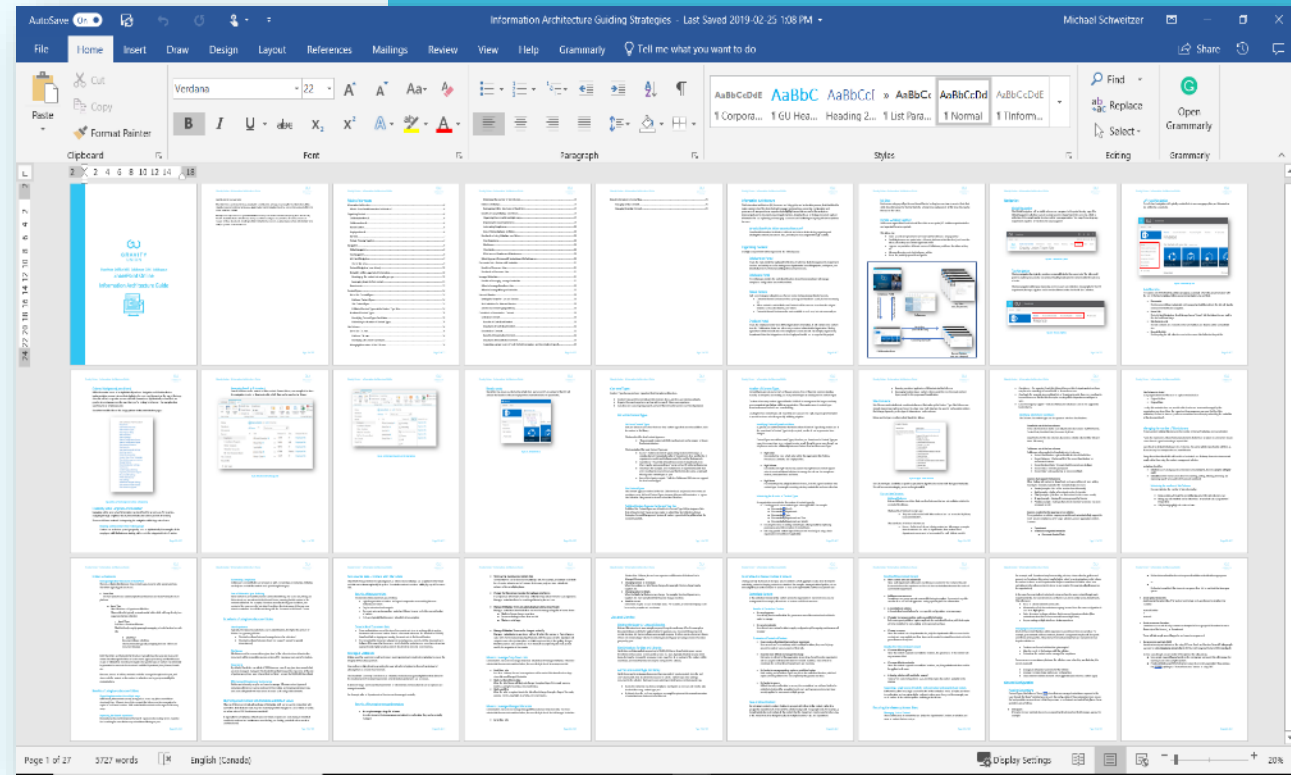
- ✓ Pre-bake key decisions
- ✓ Minimize “discussions” throughout the project
- ✓ Create a consensus and trust within the team, sponsors, client





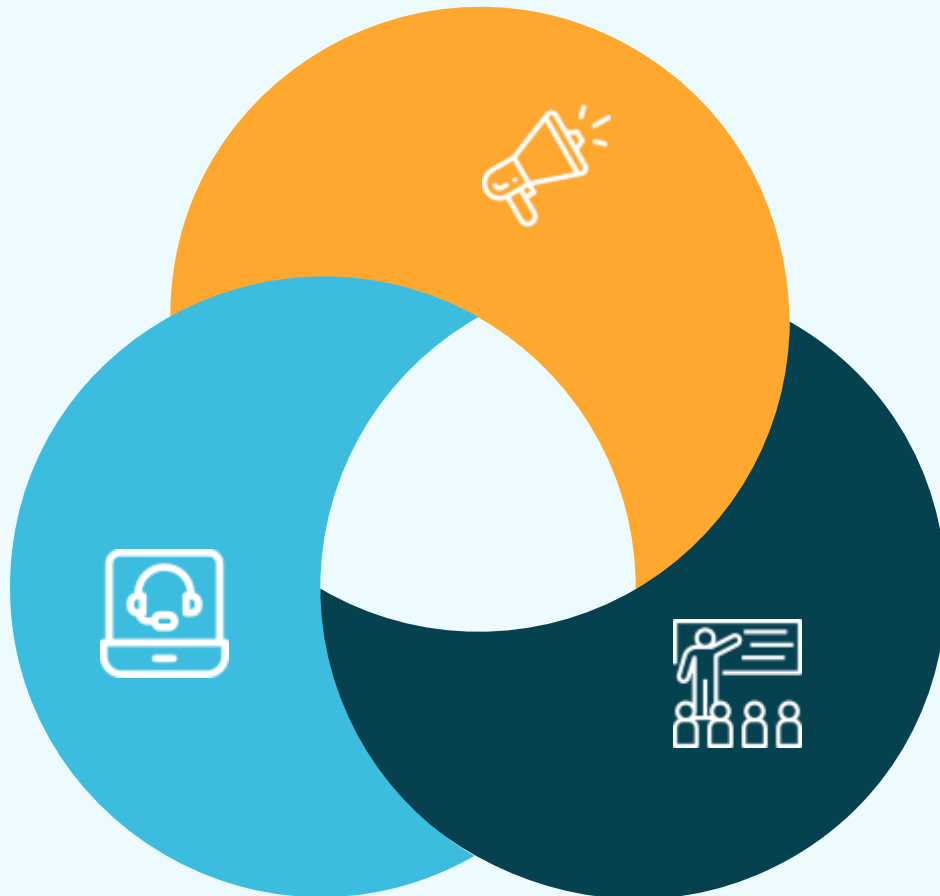
# Strategy Development

- ✓ Information Architecture
- ✓ Migration
- ✓ Search
- ✓ Security
- ✓ Applied Records Management
- ✓ Governance
- ✓ Change Management



# Change Management

## Three pillars of change



### **Communication**

Critical communication to all areas of the organization from the right people at the right time



### **Training**

Hands on lecture\lab in person training supplemented with quick reference guides and videos (1-2 hours per week throughout the onboarding process)



### **Support**

In person, help desk, self service (FAQ's, How Do I's)

Clipboard: Paste, Copy, Format Painter. Font: Verdana, 22, Bold, Italic, Underline, Text Color, Font Color. Paragraph: Bullets, Indentation, Paragraph Style, Line and Paragraph Spacing. Styles: AaBbCc, AaBbCc, AaBbCc, AaBbCcD, AaBbCcD, AaBbCcD, AaBbCc, AaBbCc. Find, Replace, Select, Dictate, Open Grammarly.

Table of Contents
1. Introduction
2. Change Management Overview
3. Key Principles
4. Roles and Responsibilities
5. Communication
6. Training
7. Support
8. Monitoring and Evaluation
9. Appendix A: Change Management Plan Template
10. Appendix B: Training Materials & Curricula
11. Appendix C: Example Training Schedule

Introduction
The information contained in these documents is confidential, privileged, and only for the use of the intended recipient and may be used for legal discovery purposes without the prior written consent of the sender.

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Change Management Overview
Change management is the process of transitioning an organization from its current state to a desired future state. This process involves identifying the need for change, developing a plan, and implementing the plan.

Key Principles
1. Communication: Effective communication is essential for successful change management.
2. Training: Employees must be equipped with the skills and knowledge needed to succeed in the new environment.
3. Support: Employees need ongoing support and resources to overcome challenges.

Communication
Effective communication is essential for successful change management. It involves identifying the need for change, developing a plan, and implementing the plan.

Change Management Plan Template
Table with columns: Item, Description, Status, Date, Owner, Review Date.

Any Project Stakeholders Communication Plan
Table with columns: Stakeholder, Role, Interest, Influence, Communication Strategy, Frequency.

Plan Group Communication Plan
Table with columns: Item, Description, Status, Date, Owner, Review Date.

Training
Training is essential for the success of any change management initiative. It involves identifying the need for change, developing a plan, and implementing the plan.

Training Role and Responsibilities
Table with columns: Role, Responsibilities.

Training Materials & Curricula
This section provides a comprehensive overview of the training materials and curricula developed for the project.

Training Schedule
Table with columns: Item, Description, Status, Date, Owner, Review Date.

Example Training Schedule
Table with columns: Item, Description, Status, Date, Owner, Review Date.

Example Training Schedule
Table with columns: Item, Description, Status, Date, Owner, Review Date.

Example Training Schedule
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Example Training Schedule
Table with columns: Item, Description, Status, Date, Owner, Review Date.

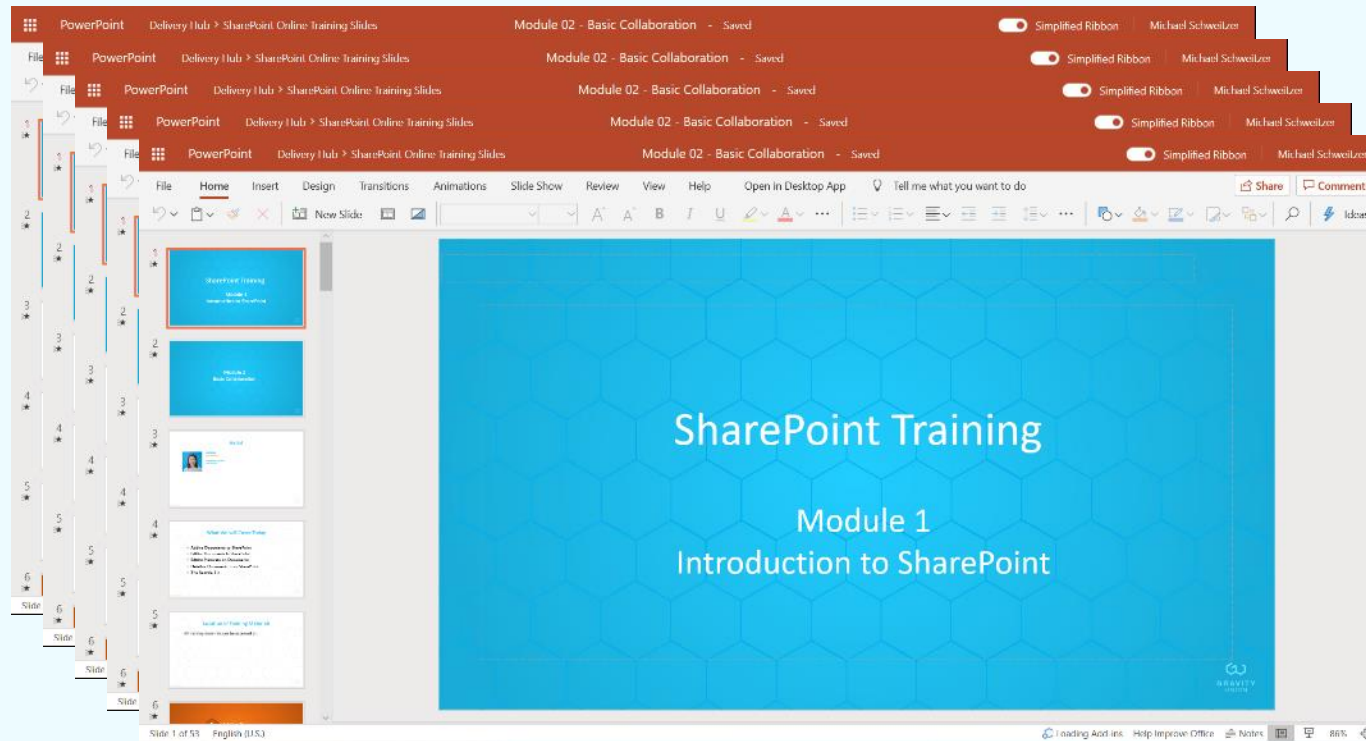
Example Training Schedule
Table with columns: Item, Description, Status, Date, Owner, Review Date.

Example Training Schedule
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Example Training Schedule
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Example Training Schedule
Table with columns: Item, Description, Status, Date, Owner, Review Date.

# Training



# Communication

[SharePoint] Content Discovery - Session 1/2 - Meeting

File Meeting Insert Format Text Review Help Tell me what you want to do

Save & Close Delete Calendar Appointment Scheduling Assistant Tracking Join Skype Meeting Meeting Notes Accept Tentative Decline Propose New Time Respond Show As: Busy Recurrence Time Zones Categorize Private High Importance Low Importance Dictate Dynamics 365 Customer Manager Insights

Accepted on 2019-11-05 7:15 AM. Sent Tue 2019-10-08 10:21 AM

Organizer: Mazdak Mohammadi <mmohammadi@mitacs.ca>

Subject: [SharePoint] Content Discovery - Session 1/2

Location: R-BC-Beta MeetingRoom

Start time: Thu 2019-11-07 10:30 AM Pacific Time (US & Canada)  All day event

End time: Thu 2019-11-07 12:30 PM Pacific Time (US & Canada)

**\*\*Updated Agenda\*\***

**Content Discovery**  
 The purpose of the content discovery session is to understand the various types of artifacts you and your team produce and collaborate on. We want to better understand the volume of content, the complexity of content, uniqueness of content, and where these items are currently stored. We will also identify the interaction points between the business units while keeping in mind your security and compliance requirements and needs. In this meeting, we will cover:

- A content discover exercise
- Next steps
- Questions

Project status at a glance:

<ul style="list-style-type: none"> <li>✓ Project Kickoff</li> <li>✓ Current State Assessment</li> <li>✓ Business Requirements</li> <li>Content Discovery</li> <li>Card Sort</li> <li>Content Map</li> <li>Content Map Review &amp; Finalize</li> </ul>	<ul style="list-style-type: none"> <li>Information Architecture (IA) Prototype &amp; Review</li> <li>Department Site Prototype &amp; Review</li> </ul>	<ul style="list-style-type: none"> <li>Intro to User Acceptance Testing (UAT)</li> <li>UAT Sessions</li> <li>Department Specific Training</li> </ul>	<ul style="list-style-type: none"> <li>Migration Plan</li> <li>Migration Parties</li> <li>Retrospective &amp; Wrap up</li> </ul>
--	--	--	--

GRAVITY UNION

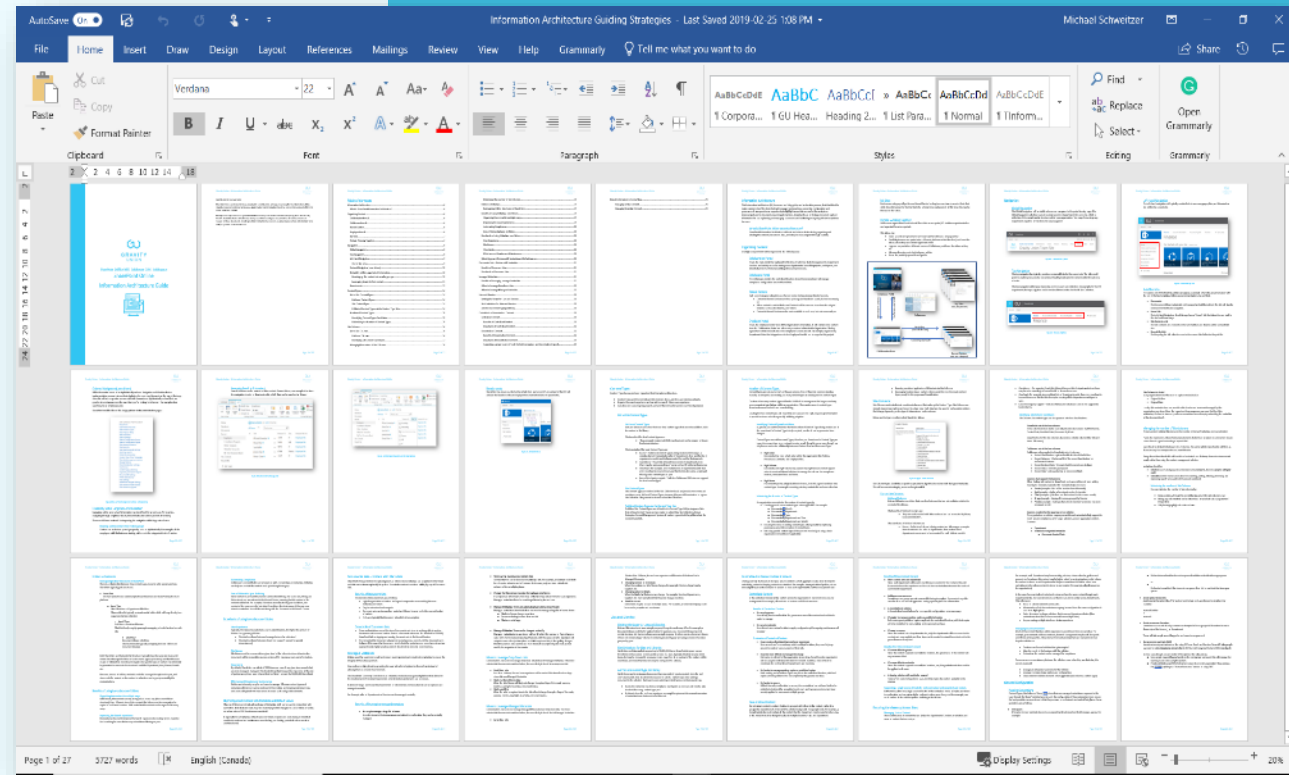
[Join Skype Meeting](#)  
 Trouble Joining? [Try Skype Web App](#)

[Help](#)

In Shared Folder Calendar - mschweitzer@gravityunion.com

# Strategy Development

- ✓ Information Architecture
- ✓ Migration
- ✓ Search
- ✓ Security
- ✓ Applied Records Management
- ✓ Governance
- ✓ Change Management



# Pilot Group(s)

Pilot Group Rollout

# 1. Planning and preparation

Introductions, administration and housekeeping

Software and hardware procurement

Planning (project, communication, support)

Developing strategic roll-out plan



# 2. Installation, strategy and training

Installing software, training core project team

Reviewing core strategies

Reviewing process and approach

Firming up project deliverables



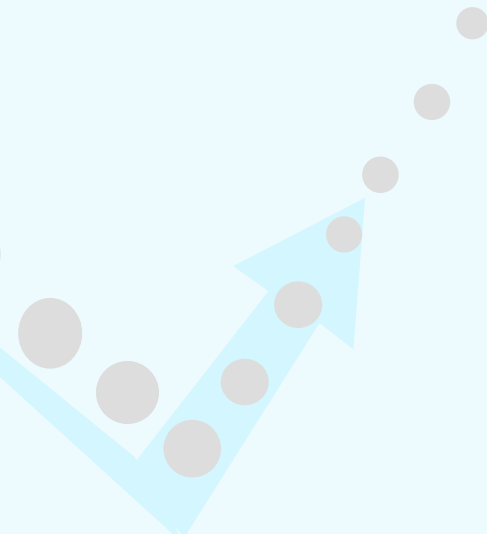
# 3. Pilot Groups

Testing out our process, approach and technology with designated pilot groups



# 4. Organization roll-out

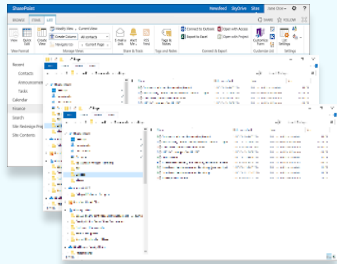
Getting the rest of the departments on board





# An overview of our **people focussed** process

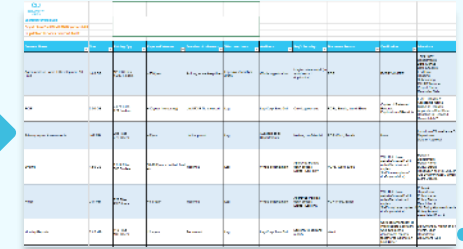
Current state assessment



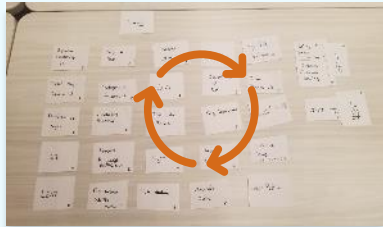
Solution requirements



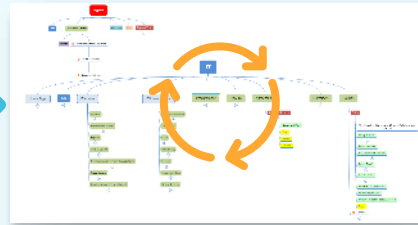
Content audit



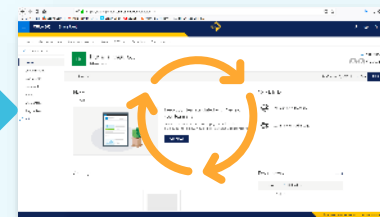
Card sort



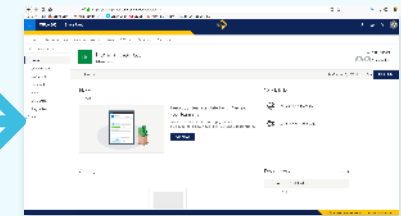
Document and Design



Solution Prototype



Review and iterate



Migration



Compliance Configuration



Lessons learned

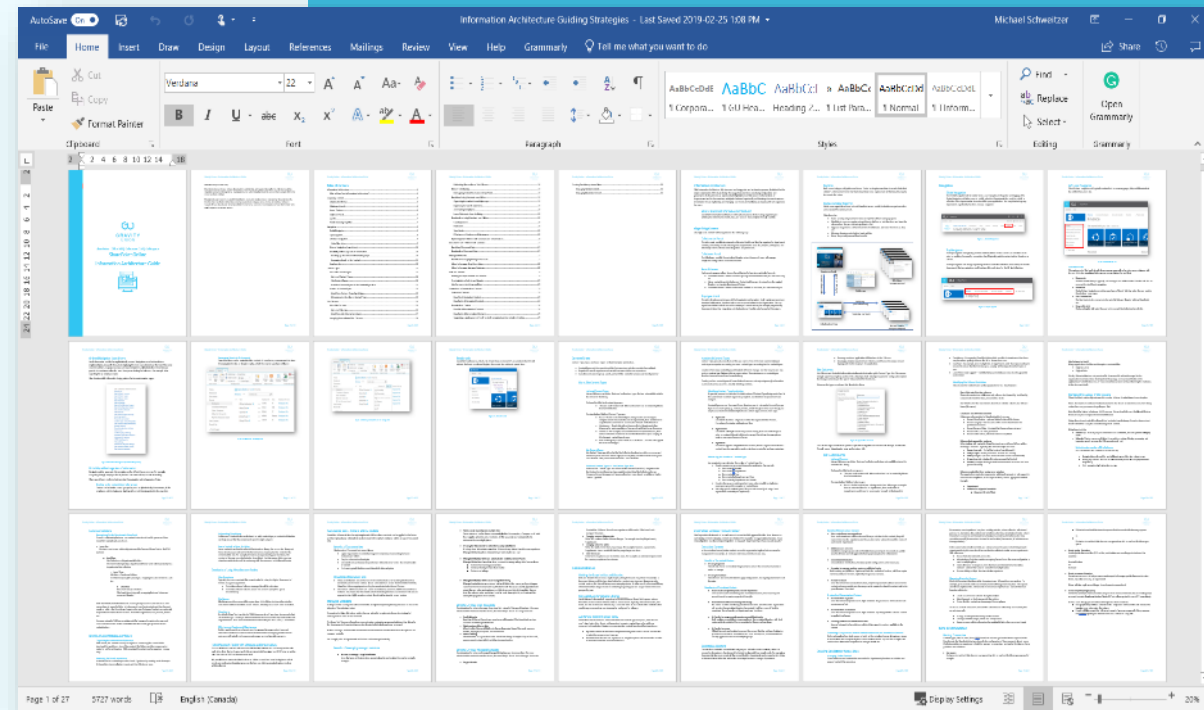


# Departmental Training



# Current State and Business Requirements

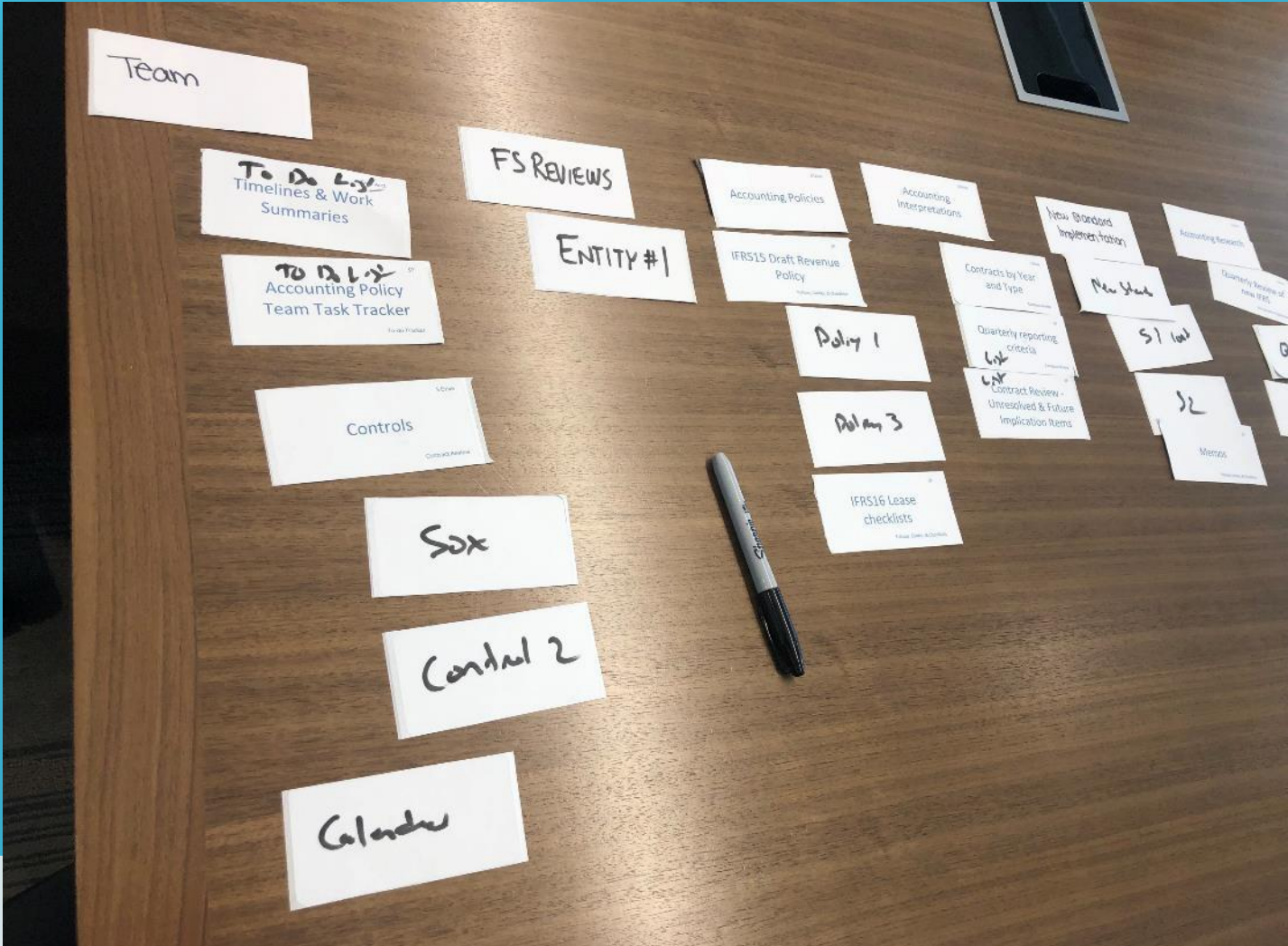
- ✓ What does the group do?
- ✓ Where does all the content live?
- ✓ Who do they work with?
- ✓ What are the key processes?
- ✓ Any notable requirements around security, mobile access, search, workflows?



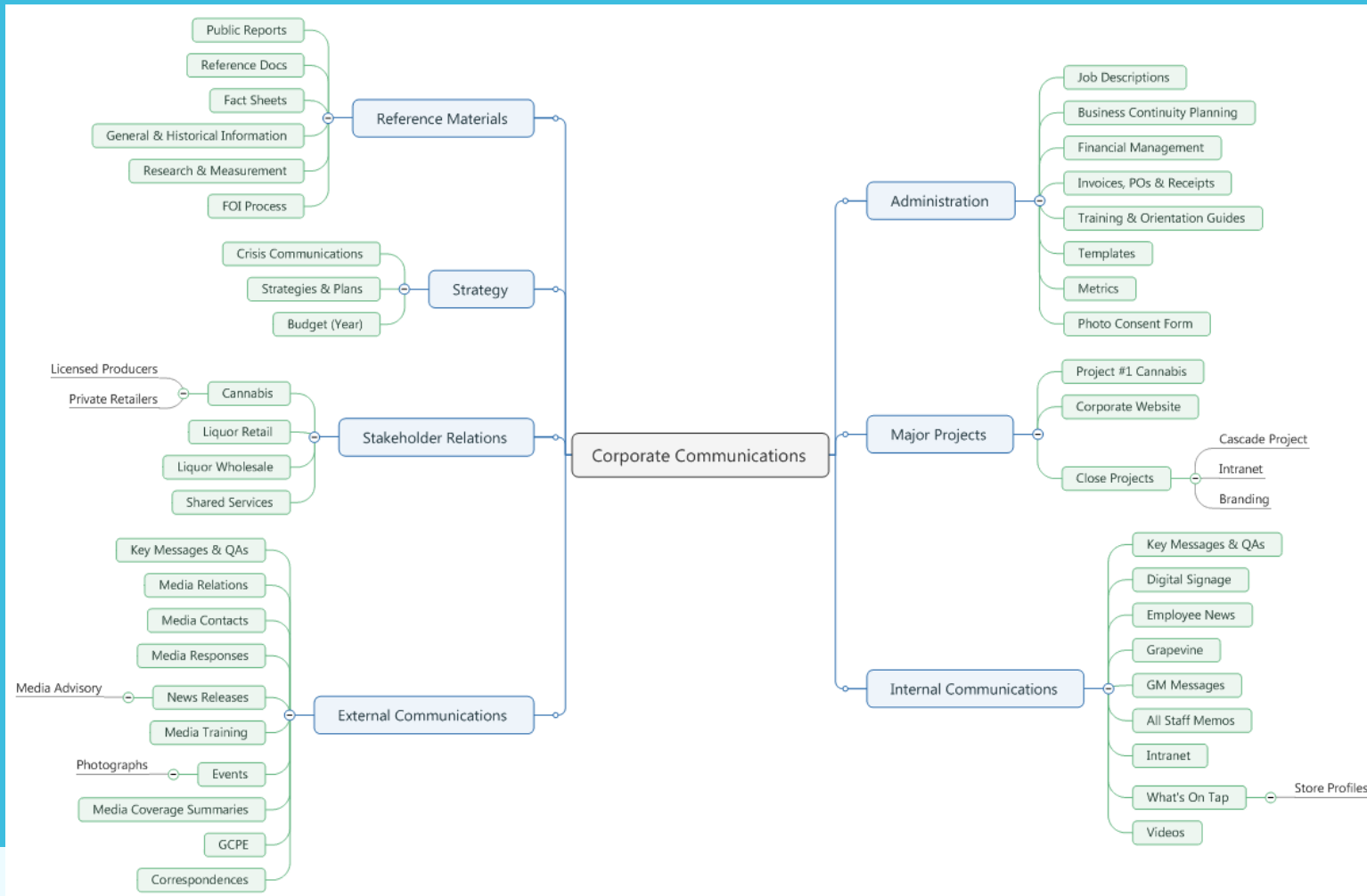
# Content Audit

Content Name	Size	Existing Qty	Expected Volume	Duration of relevance	Who uses these	Audience	Req'd Security	Document Format	Duplication	Metadata	Current Pain Points	How far back are these relevant?	Integrations?
Agreements in Force + Development AIF Files	18.8 GB	12,168 Files 1,200 Folders	~500/year	As long as we keep them	Leg saves/modifys/drafts	Whole organization	Maybe - view only? (to avoid record duplication)	PDF	EVERYWHERE	Third Party Departments Date Signed Date Effective End Date Heading Subheading Old AIF Number Project Name Reminder Date	Searching for docs/within docs Old Numbering System Record Duplication (Elec/Phys)	Depends on Agreement	Outlook Reminders/Notes
FOIP	5.59 GB	3,875 Files 471 Folders	~10/year (increasing)	Until FOIP file is closed	Leg	Leg/Corp Svcs GM	Only Leg can see	PDFs, Emails, Word, Excel	Copies of Released Records Duplication of Receipts	FOIP Request # Applicant's Name Status of Request Application/Start Date Deadline to Respond Receipt date?	Large Number of Draft Templates	Not relevant after file is closed	N/A
Privacy Impact Assessments	108 MB	206 Files 27 Folders	~5/year	Until approval	Leg	Available to all Departments	Nothing confidential	PDF, Word, Emails	None	Location of Surveillance Camera(s) Department Date of Approval	N/A	Permanent	N/A
Bylaws	1.58 GB	1,814 Files 300 Folders	50-100/year - drafted, final etc.	Indefinite	Leg	Whole organization	Approved Bylaws - open access Drafts - Leg. only	PDFs, Word, Excel	With Cold Lake website/intranet/call to order/file drive/hard copies Staff have copies of drafts (word doc)	Bylaw # Department Bylaw Name Bylaw Status Resolution # (1st, 2nd, 3rd) Old Bylaw # if appl. (amendments) Extra Descrip.	Inconsistency with drafts (standardization) Multiple locations - Cold Lake website/intranet/call to order/file drive/hard copies	Permanent	Intranet, Internet, File Drive, Hard copies, call to order
Policy	287 MB	328 Files 93 Folders	~5 a year	Indefinite	Leg	Whole organization	Approved Policies - open access Drafts - Leg only	PDF, Word, Excel	With Cold Lake website/intranet/call to order/file drive/hard copies Staff may have copies of drafts (word doc)	Policy # Department Policy Name Policy Status Resolution # Old Policy # (amendments) Policy Format Associated Form #	Inconsistency with drafts (standardization) Multiple locations - Cold Lake website/intranet/call to order/file drive/hard copies	Permanent	Intranet, Internet, File Drive, Hard copies, call to order
Monthly Reports	23.5 MB	113 Files 16 Folders	12 a year	Permanent	Leg	Leg/Corp Svcs GM	Leg only to edit and modify	Word	word document sent to Intermediate Secretary who puts all the department reports together to Council on Call2Order	Document by Month and Year Month, Year Department Document Type	Need a better collaboration process	Permanent	Call2Order

# Card Sorting



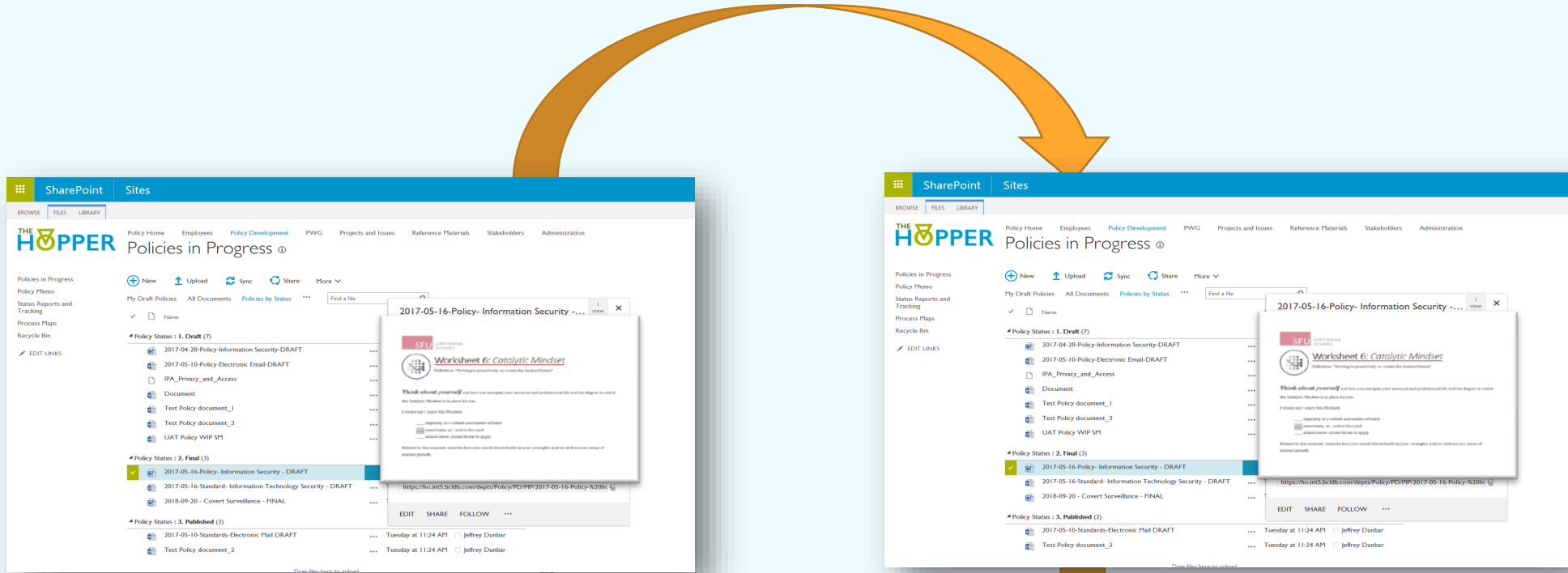
# Mind Maps



# Solution Design and Prototype

The screenshot shows a SharePoint site interface. At the top, there's a navigation bar with 'SharePoint' and 'Sites'. Below it, a breadcrumb trail includes 'BROWSE', 'FILES', and 'LIBRARY'. The main header area features the 'THE HOPPER' logo and a navigation menu with items like 'Policy Home', 'Employees', 'Policy Development', 'PWG', 'Projects and Issues', 'Reference Materials', 'Stakeholders', and 'Administration'. The page title is 'Policies in Progress'. On the left, there's a sidebar with navigation options: 'Policies in Progress', 'Policy Memo', 'Status Reports and Tracking', 'Process Maps', and 'Recycle Bin'. The main content area has a 'New' button and a search bar. Below that, there's a list of policies grouped by status: 'Policy Status : 1. Draft (7)', 'Policy Status : 2. Final (3)', and 'Policy Status : 3. Published (2)'. The selected policy is '2017-05-16-Policy- Information Security - DRAFT'. A preview window is open over this policy, showing a document titled 'Worksheet 6: Catalytic Mindset' from SFU Continuing Studies. The worksheet content includes a definition of the Catalytic Mindset and a reflection prompt: 'Think about yourself and how you navigate your personal and professional life and the degree to which the Catalytic Mindset is in place for you. I would say I apply this Mindset: \_\_\_ regularly as a default and matter of habit, \_\_\_ sometimes, as I notice the need, \_\_\_ almost never; occurs to me to apply. Related to this mindset, describe how you would like to build on your strengths and/or address you areas of desired growth.'

# Iterative Prototyping

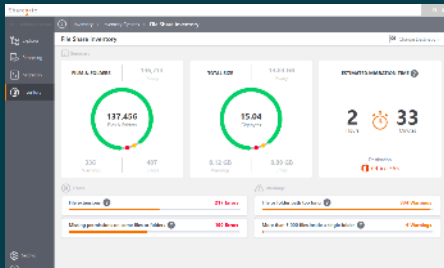




# Record Classification

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# Migration



**Tools**

```
11 namespace { namespace object {  
12     Write-Host "Process: $($ProcessName)"  
13 }  
14  
15 Write-Host "The value of '$($obj.GetValue('Name'))'"  
16 Write-Host "This is a test!"  
17 Write-Host "This is a final string: $($obj.GetValue('Name'))"  
18  
19 [array]$members = @($obj.GetValue('Members'))  
20 $obj.GetValue('Members') | ForEach-Object {  
21     Write-Host "Process: $($obj.GetValue('Name'))" + " - $($obj.GetValue('Name'))"  
22 }  
23  
24 [int]$number = 10  
25 $number | Get-Number  
26  
27 $numberString = $number.ToString()  
28 $numberString | Get-Number  
29  
30 [string]$number = $number  
31 [string]$number | Get-Number  
32  
33 [int]$number | Get-Number  
34  
35 $numberProcess = $number  
36  
37 $numberProcess | Get-Number  
38  
39 $numberProcess | Get-Number  
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41 $numberProcess | Get-Number  
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97 $numberProcess | Get-Number  
98  
99 $numberProcess | Get-Number  
100
```

**Scripted**



**Migration Parties!!!**

# Collabware Configuration

The screenshot shows a web browser window displaying the Collabware File Plan configuration interface. The browser's address bar shows the URL: `http://qasp:81/layouts/15/Collabware/LM/Compliance/FilePlan.aspx`. The browser tabs include "Recines - All Documents" and "File Plan". The browser's bookmark bar contains links for "Central Administration", "Job Definitions", "Timer Job Status", "Content Type Hub", "Portal", "Records Center", and "CLM Admin".

The interface features a top navigation bar with "SharePoint" and "Sites" labels, a settings gear icon, a help question mark icon, and the user name "administrator". Below this is a secondary navigation bar with "BROWSE", "FILE PLAN", and "RECORD CATEGORY" tabs. The "RECORD CATEGORY" tab is active, showing a toolbar with icons for "Subcategory", "Compliance Policy", "Access Control Level", "Aggregate Template", "Create Repository", "Edit Properties", "Delete", "Stop Inheriting", "Restore Inheritance", "View Content", and "Export Metadata".

The main content area is divided into a left sidebar and a main panel. The sidebar contains a navigation menu with categories: "DASHBOARD", "AGGREGATES", "COMPLIANCE", "PHYSICAL", "RULES AND WORKFLOW", "DISCOVERY", and "CONFIGURATION". Under "COMPLIANCE", "File Plan" is selected, and a sub-menu is open showing "Vital Records", "Record Category Templates", and "File Plan". The "Record Category Templates" sub-menu is expanded, displaying a search box for "Record Category" and a list of categories: "1.0 - Finance", "ATI - Access to Information", "Caf - Cafeteria", "DZ-TRN-01 - DZ Training Records", "HR - Human Resources", "HR-00 - Program Management", "HR-01 - Committees", "HR-02 - Staffing", "HR-03 - Employee Files", "IM - Information Management", "IT - Information Technology", "LEG - Legal Services", and "PC - Procurement and Contracting". The "HR-02 - Staffing" category is selected and highlighted.

The main panel displays the configuration for the "HR-02 - Staffing" record category. The record ID is "00000000VX". The "Details" tab is active, showing the following information:

- OPFN DATE:** May 30, 2018
- CLOSE DATE:**
- PROPERTIES:**
- Personal Information:** Yes
- Security Classification:** Unclassified

At the bottom of the browser window, a message reads: "to direct input to this VM, move the mouse pointer inside or press Ctrl+G." The Windows taskbar is visible at the bottom right, showing the system tray and taskbar icons.





# Corporate Policy

Who We Are Key Initiatives Meet the Team

Recycle Bin EDIT LINKS

The Corporate Policies team provides Government and Operational Services. Under Government Services the team provides services su and other jurisdictions, drafting briefing notes and meeting notes for Government, facilitating decision-making and provide advice on policy issues that may impact external stakeholders, facilitating and advising on responses to stakeholder inquiries, and supporting the execution of Government Policy. Under Operational Services the team provides services such as; assisting with drafting and reviewing operational policies and guidelines, including performing research and analysis, providing advice when there are grey areas related to a policy, liasing between and analysis on policy issues.

## My Relevant Documents

There are no items to show in this view.

## Newsfeed

Start a conversation



## Site Contacts

+ new item or edit this list

✓ Title	Contact
Site Administrator	Senior Policy Analyst, Corporate Services
Site Contact	Director, Corporate Policy - Corporate Services

## Useful Links

+ new item or edit this list

- ✓ URL
- Policy Portal



# Policies in Progress

- Policies in Progress
- Policy Memo
- Status Reports and Tracking
- Process Maps
- Recycle Bin
- EDIT LINKS

New Upload Sync Share More

My Draft Policies All Documents Policies by Status Find a file

✓	Name	Modified	Modified By
<b>Policy Status : 1. Draft (7)</b>			
	2017-04-28-Policy-Information Security-DRAFT	Tuesday at 11:24 AM	Jeffrey Dunbar
	2017-05-10-Policy-Electronic Email-DRAFT	Tuesday at 11:24 AM	Jeffrey Dunbar
	IPA_Privacy_and_Access	Tuesday at 11:24 AM	Jeffrey Dunbar
	Document	Tuesday at 11:24 AM	Jeffrey Dunbar
	Test Policy document_1	Tuesday at 11:24 AM	Jeffrey Dunbar
	Test Policy document_3	Tuesday at 11:25 AM	Jeffrey Dunbar
	UAT Policy WIP SM	Tuesday at 11:25 AM	Jeffrey Dunbar
<b>Policy Status : 2. Final (3)</b>			
	2017-05-16-Policy- Information Security - DRAFT	Tuesday at 11:24 AM	Jeffrey Dunbar
	2017-05-16-Standard- Information Technology Security - DRAFT	Tuesday at 11:24 AM	Jeffrey Dunbar
	2018-09-20 - Covert Surveillance - FINAL	Tuesday at 11:24 AM	Jeffrey Dunbar
<b>Policy Status : 3. Published (2)</b>			
	2017-05-10-Standards-Electronic Mail DRAFT	Tuesday at 11:24 AM	Jeffrey Dunbar
	Test Policy document_2	Tuesday at 11:24 AM	Jeffrey Dunbar

Drag files here to upload



# Policies in Progress

- Policies in Progress
- Policy Memo
- Status Reports and Tracking
- Process Maps
- Recycle Bin
- EDIT LINKS

New
 Upload
 Sync
 Share
 More

My Draft Policies All Documents Policies by Status

✓	Name	
<b>Policy Status : 1. Draft (7)</b>		
	2017-04-28-Policy-Information Security-DRAFT	...
	2017-05-10-Policy-Electronic Email-DRAFT	...
	IPA_Privacy_and_Access	...
	Document	...
	Test Policy document_1	...
	Test Policy document_3	...
	UAT Policy WIP SM	...
<b>Policy Status : 2. Final (3)</b>		
✓	2017-05-16-Policy- Information Security - DRAFT	...
	2017-05-16-Standard- Information Technology Security - DRAFT	...
	2018-09-20 - Covert Surveillance - FINAL	...

**2017-05-16-Policy- Information Security -...** view X

---

CONTINUING STUDIES

**Worksheet 6: *Catalytic Mindset***

Definition: "Striving to proactively co-create the desired future"

**Think about yourself** and how you navigate your personal and professional life and the degree to which the Catalytic Mindset is in place for you.

I would say I apply this Mindset:

regularly as a default and matter of habit

sometimes, as I notice the need

almost never occurs to me to apply

Related to this mindset, describe how you would like to build on your strengths and/or address you areas of desired growth.

---

Changed by  Jeffrey Dunbar on 10/9/2018 11:24 AM

Shared with  [redacted] and 8 more

<https://ho.int5.bclbdb.com/depts/Policy/PD/PIP/2017-05-16-Policy-%20In>

### Lifecycle Details

#### LIFECYCLE DETAILS

Edit Properties Manage	Select Event Events	<input type="text"/> Apply Event	<input type="text"/> Apply Relationship Relationships	Add to Hold Holds	Copy URL Share	Reclassify Record Administration	Reverse Item State Administration
---------------------------	------------------------	----------------------------------	--	----------------------	-------------------	-------------------------------------	--------------------------------------

**Banana Bread.docx** 00000001S4

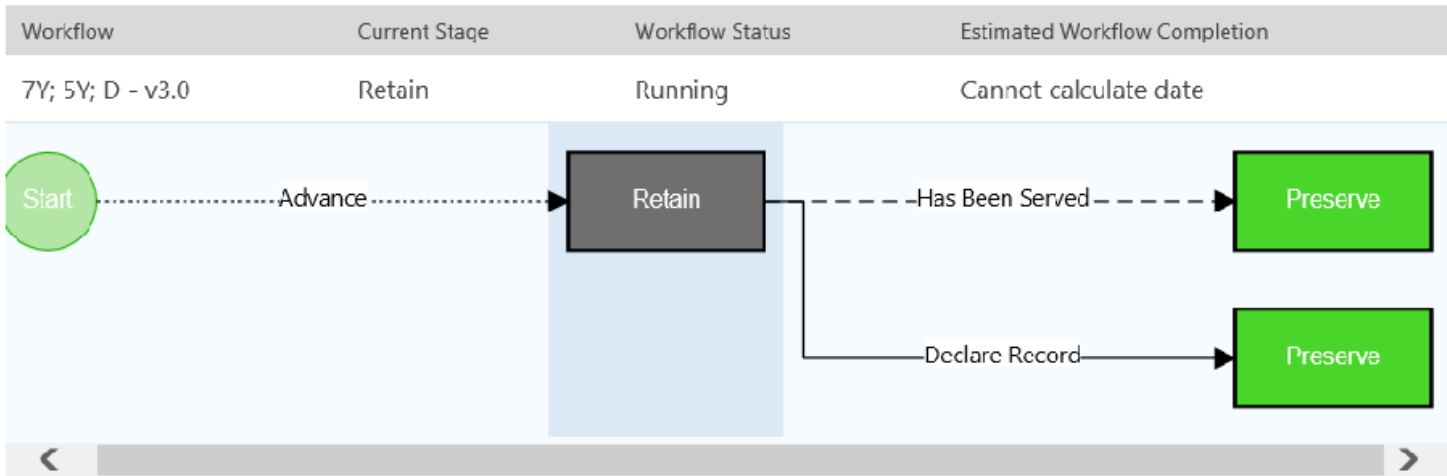
Recipe

Created at 10/17/2019, 10:27 AM by qa\administrator

[Cafeteria](#) > [Recipes](#) > [Banana Bread.docx](#)

Last modified at 10/17/2019, 10:31 AM by qa\administrator

Properties Workflow Relationships Audit



#### STAGE DETAILS

**Retain**

DESCRIPTION  
The Item will wait for the specified Retain Period. Time Period can be defined using many different calculations, including workflow events and custom date fields. To wait the full Retain Period, use the Advance to Next Action connector. Event or Content Rule connectors coming from the Retain Action are a trigger that will cut short the Retain Period when the Event or Content Rule is triggered.

## Lifecycle Details



## LIFECYCLE DETAILS

Edit Properties Manage	Select Event Events	Apply Event <input type="text"/>	Apply Relationship <input type="text"/>	Add to Hold Holds	Copy URL Share	Reclassify Record Administration	Reverse Item State Administration
---------------------------	------------------------	-------------------------------------	--	----------------------	-------------------	-------------------------------------	--------------------------------------

## Banana Bread.docx

00000001S4

Recipe

Created at 10/17/2019, 10:27 AM by qa\administrator

Cafeteria &gt; Recipes &gt; Banana Bread.docx

Last modified at 10/17/2019, 10:31 AM by qa\administrator

Properties   Workflow   Relationships   Audit

Initiated	Initiated By	Action
11/8/2019 12:26 PM	administrator	Item Updated
11/8/2019 12:23 PM	administrator	Item Updated
11/8/2019 10:32 AM	administrator	Item Updated
10/17/2019 10:31 AM	administrator	Item Updated
10/17/2019 10:31 AM	administrator	Item Updated
10/17/2019 10:29 AM	administrator	Item Updated
10/17/2019 10:27 AM	SP_Farm	Workflow '7Y; 5Y; D' was started.
10/17/2019 10:27 AM	administrator	Item Updated
10/17/2019 10:27 AM	administrator	Item Added



# Organizational roll-out



# 1. Planning and preparation

Introductions, administration and housekeeping

Software and hardware procurement

Planning (project, communication, support)

Developing strategic roll-out plan



# 2. Installation, strategy and training

Installing software, training core project team

Reviewing core strategies

Reviewing process and approach

Firming up project deliverables



# 3. Pilot Groups

Testing out our process, approach and technology with designated pilot groups



# 4. Organization roll-out

Getting the rest of the departments on board

# Departmental Ordering

Schedule		SharePoint Departmental Implementation																				Size	Complexity	Effort	Scheduling Notes
Sequence Order	Scope	Team	2019			2020									2021										
			Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar					
	Planning			█	█	█																			
	Preparation			█	█	█	█																		
Pilot Group	1 Facilities	1					█	█	█													2	Low	Low	Available anytime, however
Pilot Group	2 Finance - AR Collections	2					█	█	█													11	Low	Low	Available anytime, however
	3 IT - IT Management, CRM&BI and Support	1						█	█	█	█									█		18	Low	Low	Available anytime, however
	4 HR	2						█	█	█	█											3	Low	Low	Available anytime.
	5 Finance - AP & Accounting	1						█	█	█	█										█	15	Low	Low	Prepare for Audit in Dec an
	6 Finance - Treasury	2						█	█	█	█											15	Low	Low	Prepare for Audit in Dec an
	7 Contracts Site	1									█	█	█									N/A	Low	Low	
	8 Executives	2									█	█	█									9	Low	Low	9 Executives were identifie
	9 Sales	1										█	█	█								16	Low	Medium	Lease, NE Sales Admin, UE
	10 Safety	2										█	█	█								8	Low	Medium	Available anytime. Willing
	11 Solution Design	1											█	█								4	Medium	Medium	Available anytime.
	12 Rentals	2											█	█	█						█	20	Medium	High	Available except in Oct wh
	13 Marketing - Marketing	1												█	█	█						25	Medium	Medium	Marketing team total is 25,
	14 Marketing - Data	2												█	█	█						0	Medium	Medium	Same as above (10ppl in Da
	15 Training	1													█	█	█				█	20	Medium	High	Available except for summ
	16 Sales - Cranes	2															█	█	█			40	Medium	High	

# Scrum

Work Streams



# Kanban

Tiger Team  
Departmental  
Rollouts

Not Started	Next UP	In Progress	Ready for Review	Editing Post review	Delivered
2 cards	1 card	3 cards	2 cards	1 card	12 cards
2 cards	0 cards	1 card	1 card	0 cards	1 card
0 cards	0 cards	0 cards	0 cards	0 cards	0 cards

In Queue	Schedule	Drafting Building	Held	In Review	Editing Modifying	Ready for Sign-Off
3 cards (FIN Corp)	0 cards	0 cards	0 cards	0 cards	0 cards	0 cards
3 cards (FIN Corp)	0 cards	0 cards	0 cards	0 cards	0 cards	0 cards
3 cards (FIN Corp)	0 cards	0 cards	0 cards	0 cards	0 cards	0 cards
1 card (FIN Corp Accounting)	0 cards	0 cards	0 cards	0 cards	0 cards	2 cards (Real Estate - Facility)
1 card (Real Estate - Construction)	0 cards	0 cards	0 cards	0 cards	0 cards	1 card
2 cards (AR)	0 cards	0 cards	0 cards	0 cards	0 cards	2 cards
1 card (AP)	0 cards	0 cards	0 cards	0 cards	0 cards	0 cards
1 card (IT Enterprise Solution)	0 cards	0 cards	0 cards	0 cards	0 cards	1 card (Wholesale Pricing)
1 card (Wholesale Imports)	0 cards	0 cards	0 cards	0 cards	0 cards	3 cards
3 cards (Store Ops-Admin)	0 cards	0 cards	0 cards	0 cards	0 cards	0 cards
1 card (Wholesale Supply Chain Core)	0 cards	0 cards	0 cards	0 cards	0 cards	1 card

**Building**  
Design & Solutioning

Prototype Review

Functioning SharePoint Site Review

**Testing**  
Dry-Runs

Intro to Dry-Runs & Testing

**Migrating**

Migration Plan Review Session

Migration Parties

**Go Live**

Retrospective (Lessons Learned) Session

Project Support Period (for 3 weeks post-migration)

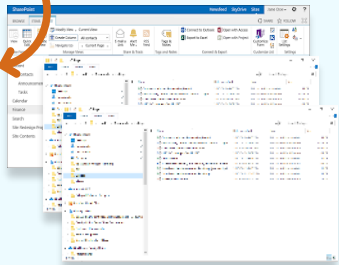
Operations & Ongoing Support

**DONE**

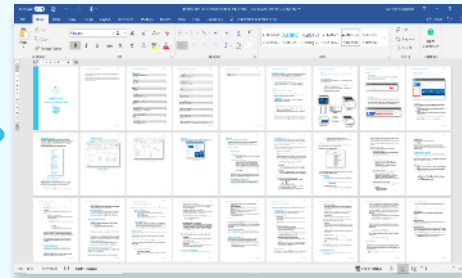


# Each group running through the process

Current state assessment



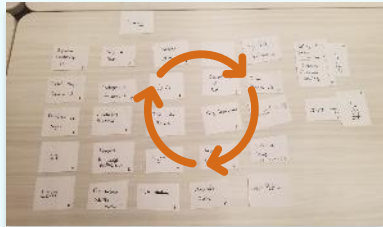
Solution requirements



Content audit

Content ID	Content Type	Content Description	Content Status	Content Location	Content Owner	Content Last Modified	Content Version	Content Audit Date	Content Audit Status
1	Document	Document 1	Active	Location 1	Owner 1	Date 1	Version 1	Date 1	Status 1
2	Document	Document 2	Active	Location 2	Owner 2	Date 2	Version 2	Date 2	Status 2
3	Document	Document 3	Active	Location 3	Owner 3	Date 3	Version 3	Date 3	Status 3
4	Document	Document 4	Active	Location 4	Owner 4	Date 4	Version 4	Date 4	Status 4
5	Document	Document 5	Active	Location 5	Owner 5	Date 5	Version 5	Date 5	Status 5

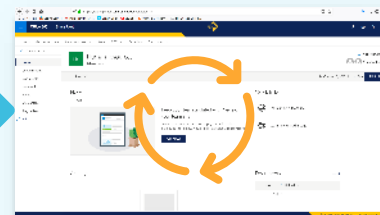
Card sort



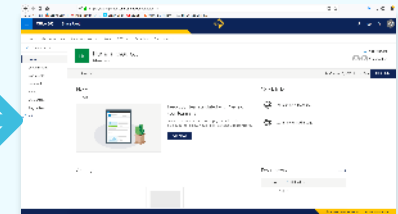
Document and Design



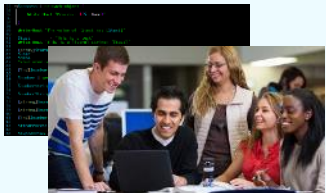
Solution Prototype



Review and iterate



Migration



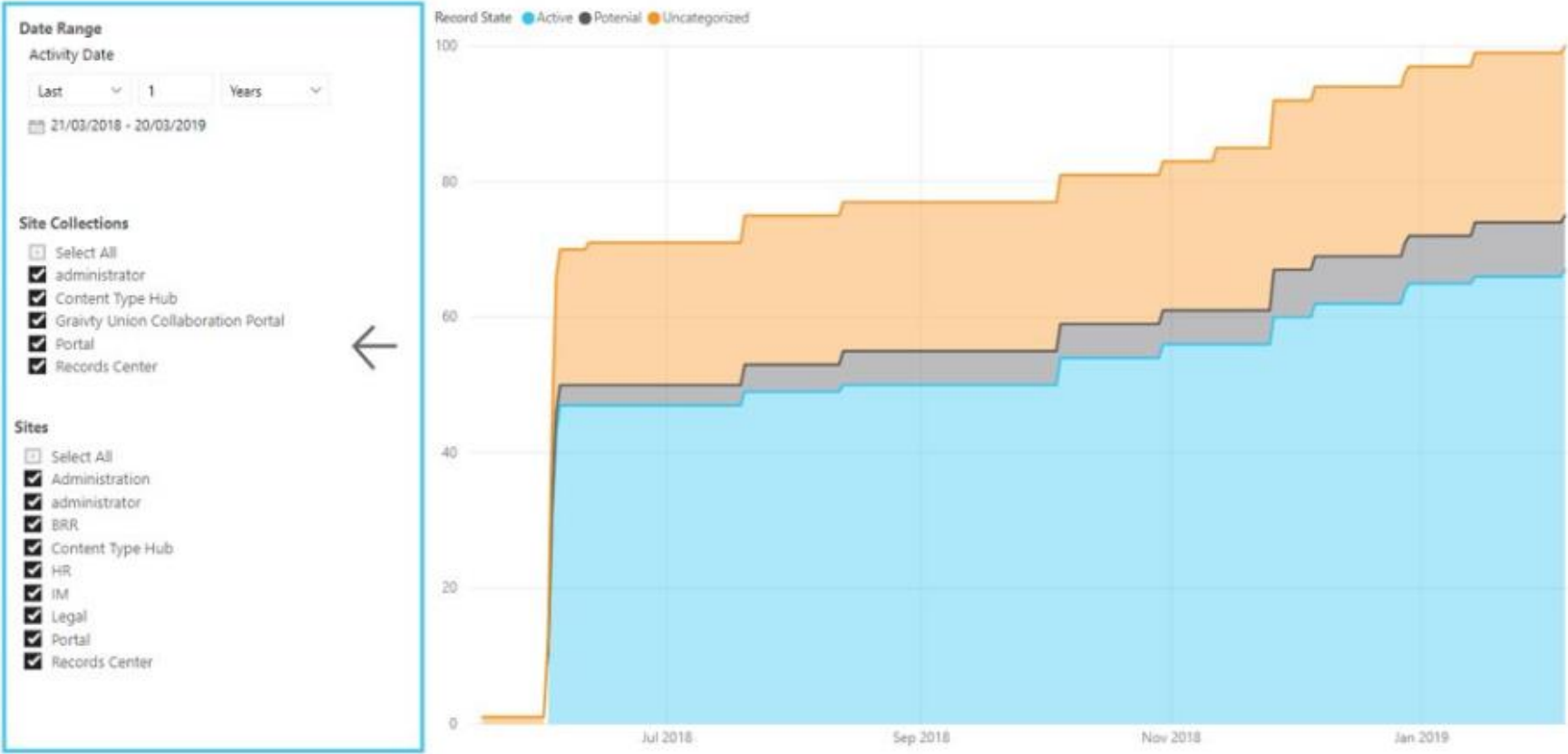
Compliance Configuration



Lessons learned



# Record States Over Time



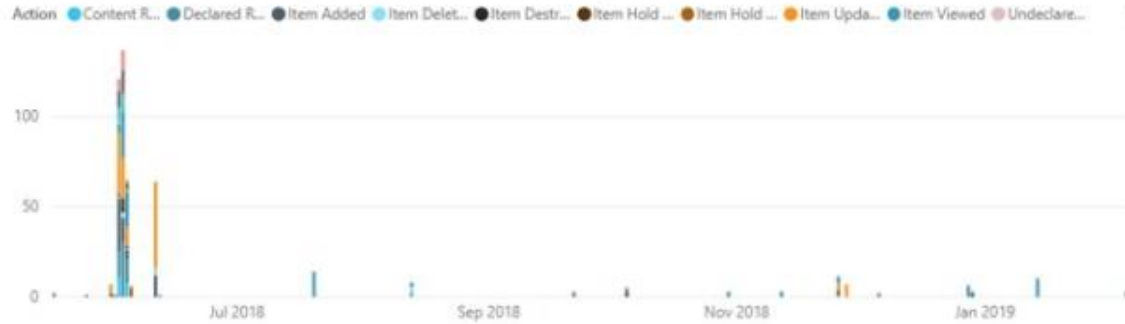
Have questions? We can help! Contact Gravity Union at [contact@gravityunion.com](mailto:contact@gravityunion.com)



# Audit Log - Actions By Library



Actions by Date

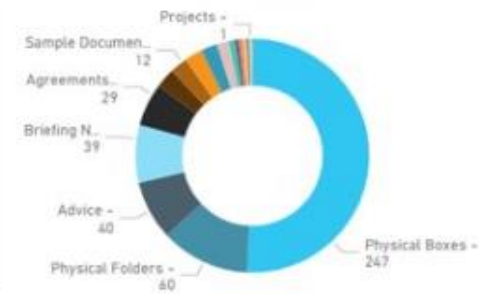


Action Distribution



Site Collection	Site	Library	Action	Action Count
administrator	administrator	Documents	Item Viewed	1
			<b>Total</b>	<b>1</b>
Content Type Hub	Content Type Hub	Projects	Item Viewed	1
			<b>Total</b>	<b>1</b>
Graivity Union Collaboration Portal	Administration	Expense Reports	Declared Record	1
			Item Hold Add	1
		<b>Total</b>	<b>2</b>	
		Sample Documents	Item Hold Add	1
			Item Hold Remove	1
			Item Viewed	2
		<b>Total</b>	<b>4</b>	
	HR	2019 Resumes	Item Viewed	2
		<b>Total</b>	<b>2</b>	
	IM	Advice	Item Viewed	4

Actions per Library



Have questions? We can help! Contact Gravity Union at [contact@gravityunion.com](mailto:contact@gravityunion.com)

Actions By Library

Filters





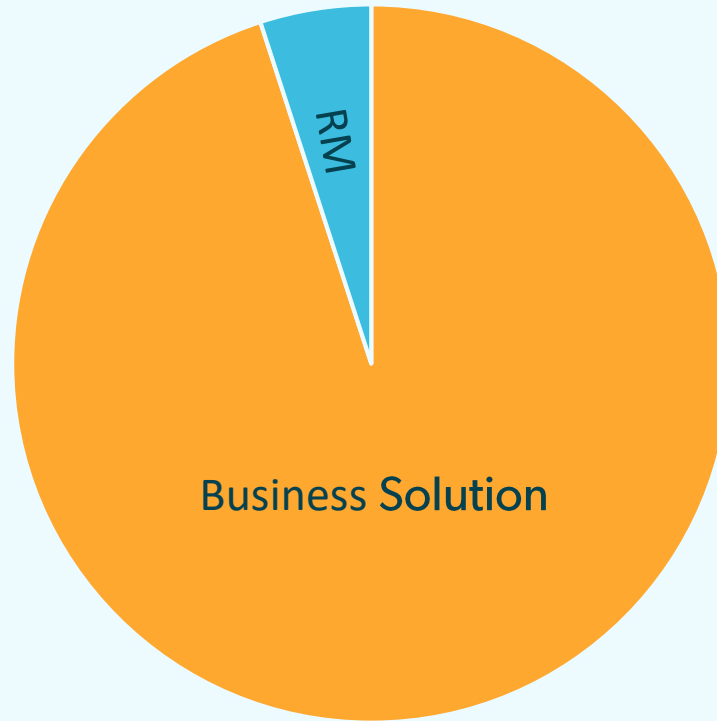
# End Result

# Effort and duration per department

- ✓ ~10 Weeks - Average duration of engagement per department
- ✓ ~ 6 Weeks – lowest duration of engagement per department
- ✓ ~ 16 Weeks – Longest duration of engagement per department
- ✓ ~200 hours - Average effort of engagement per department
- ✓ ~160 hours - Smallest effort for a given department
- ✓ ~400 hours - Largest effort for a given department
- ✓ ~ 40 hours – average time required from department

# Solution Effort by Type

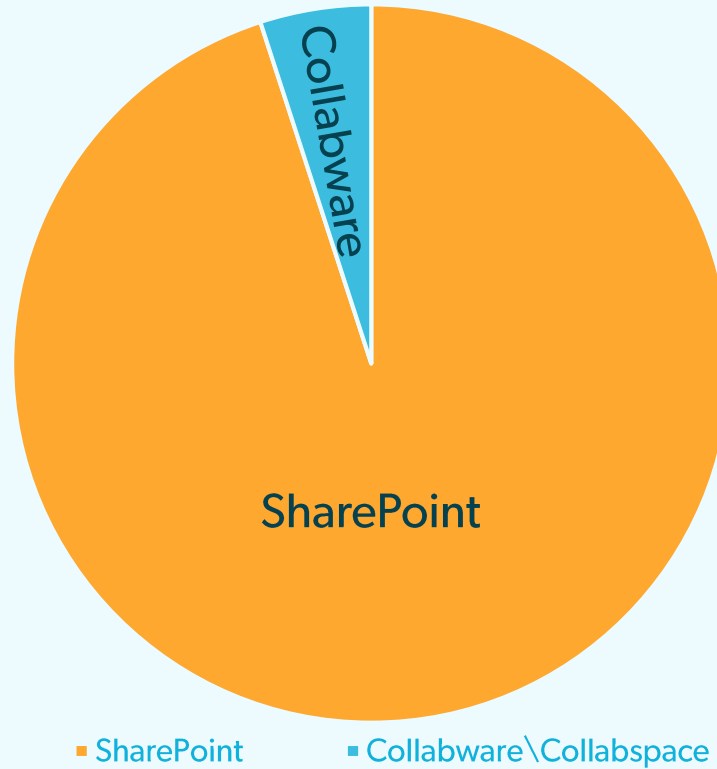
Solution Effort By Type



■ Business Solution ■ Records Management

# Solution Effort By Technology

Solution Effort By Technology



# Mission Accomplished

- ✓ ~56 Departments onboarded
- ✓ ~800 Users trained and using the system
- ✓ ~4 Million Documents migrated
- ✓ ~1 Integration(s) with line of business systems
- ✓ ~18 Months end to end
- ✓ ~100% Adoption
- ✓ 1000's of documents added and classified every day

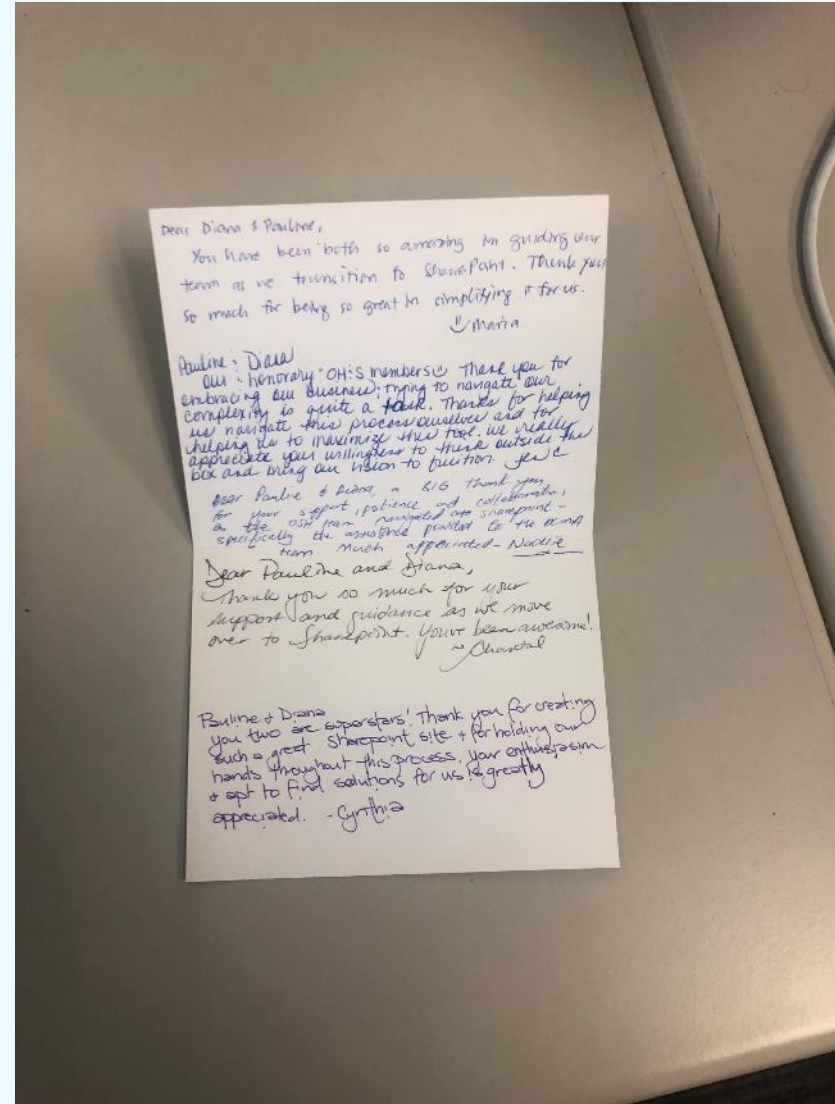
# Configuration Stats

- ✓ ~450 Content Types
- ✓ ~300 Site Collections
- ✓ ~25,000 Document Libraries
- ✓ ~100% of documents are classified against the file plan



*We have been using our SharePoint site for a while now and the team is reporting that the downloading of documents, editing and destruction is so much more efficient. One thing that is a big win for us is the increased **effectiveness** and **efficiencies** we have gained as a result of the project and transition. It is taking one quarter of the time to administer our documents, find files and explore the [solution].*

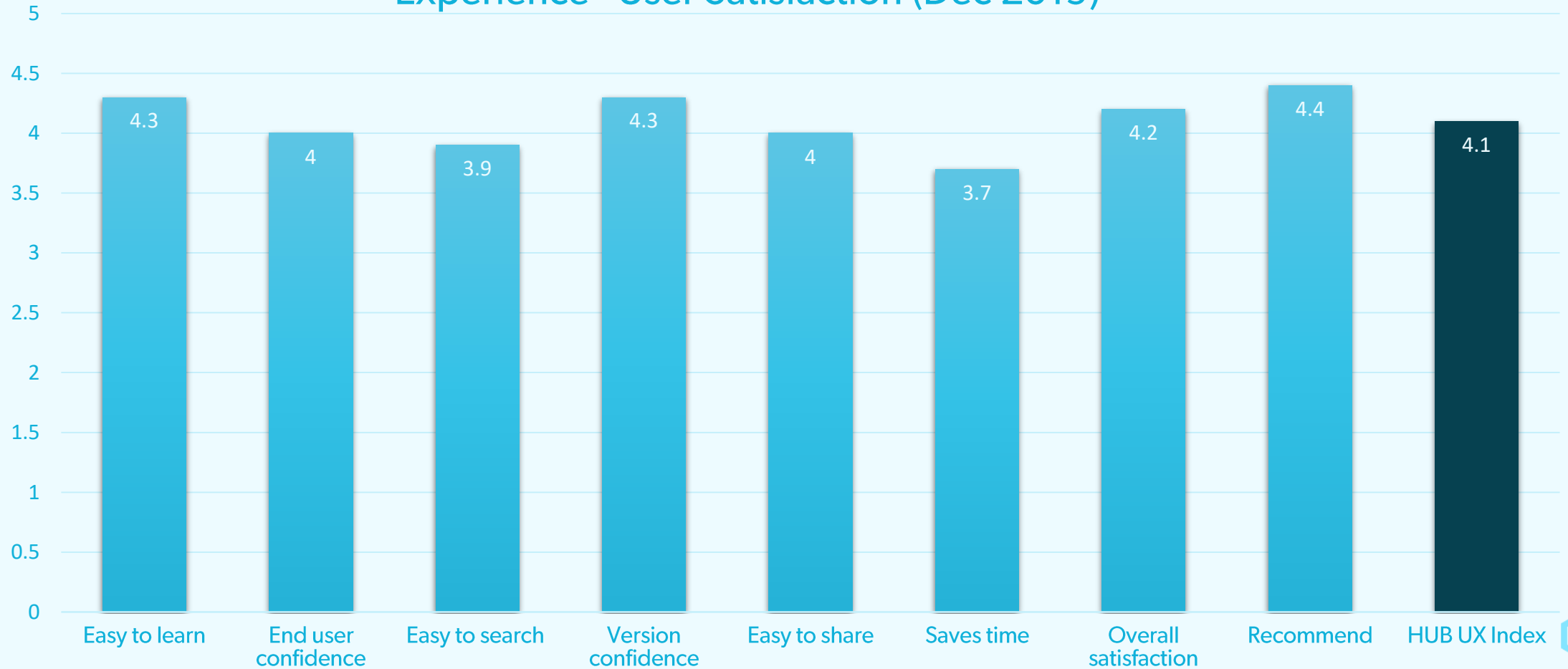
*- Director*





# End Results

Experience - User Satisfaction (Dec 2019)



# Lessons Learned



# Top 5 lessons learned (across all our clients)

- ✓ Top down support (executives and managers) is **critical**
- ✓ Training, training and training! In person – 6-8 hours of training at a **minimum** spread over 6-8 weeks
- ✓ The more bespoke the solution the more ROI for end user, the more they will use it **and** the easier it is to classify against the file plan.
- ✓ **Active support** uncovers more problems, more quickly than passive support and helps with adoption
- ✓ **Have fun!** (Relationship building between the project and the business)

# Top 5 ECM mistakes

We see in the market

# An arbitrary end date

These projects take 18-36 months to do successfully

# **Dump it in SharePoint and We'll fix it later**

Placing content in SharePoint without proper design will be more costly in the long run

# Not building a bespoke solution

The more bespoke the solution, the more ROI for end user, and the more they will use it, Templates are only good for certain scenarios (projects, committees, employee files etc.)

# No strategic departmental ordering

Plan the roll-out in a way that builds on success



# Avoiding end user engagement

You can't build a system for end users successfully without them

# Q&A



**Thank you for  
joining!**

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