



Electronic Document and Records Management System (EDRMS) implementations fail for a number of reasons, not usually related to the system or the software. They fail when employees are sceptical, suspicious, and just not on board.

What's wrong with the way we're doing things now?
It's too hard and I don't have the time.
It's a compliance issue.
Why should I?

When individual behaviours or habits don't change with the launch of the new system, you don't achieve compliance or consistency in recordkeeping. The result: your EDRMS implementation fails to reach the level of maturity of recordkeeping required to achieve the goal of your project (see Figure 1).

Managing Change – The Change Factory Approach

An EDRMS implementation represents a major change in an organisation. Not just in software or IT, but in changing people's behaviour.

Change Factory specialises in change management. In assisting Australia's largest EDRMS rollout for a leading energy provider, we've earned a reputation for developing and implementing a change management solution that delivers success in this specific area.

Our approach is based on achieving engagement with all stakeholders, followed by a focus on two key change management tasks:

- 1. Changing organisational (division/branch/department) behaviour in relation to record management and implementation; and priority.
- 2. Changing individual behaviour in relation to record keeping.

Working as part of your team, our role is to look after your:

- Change management strategy and plan
- Stakeholder management strategy and plan
- Communications strategy design and execution
- Training strategy and plan

The Rules of Getting Engagement

Failing to obtain both the sponsorship of senior managers and engagement of users is the death-knell for as many as 70% of IT projects.

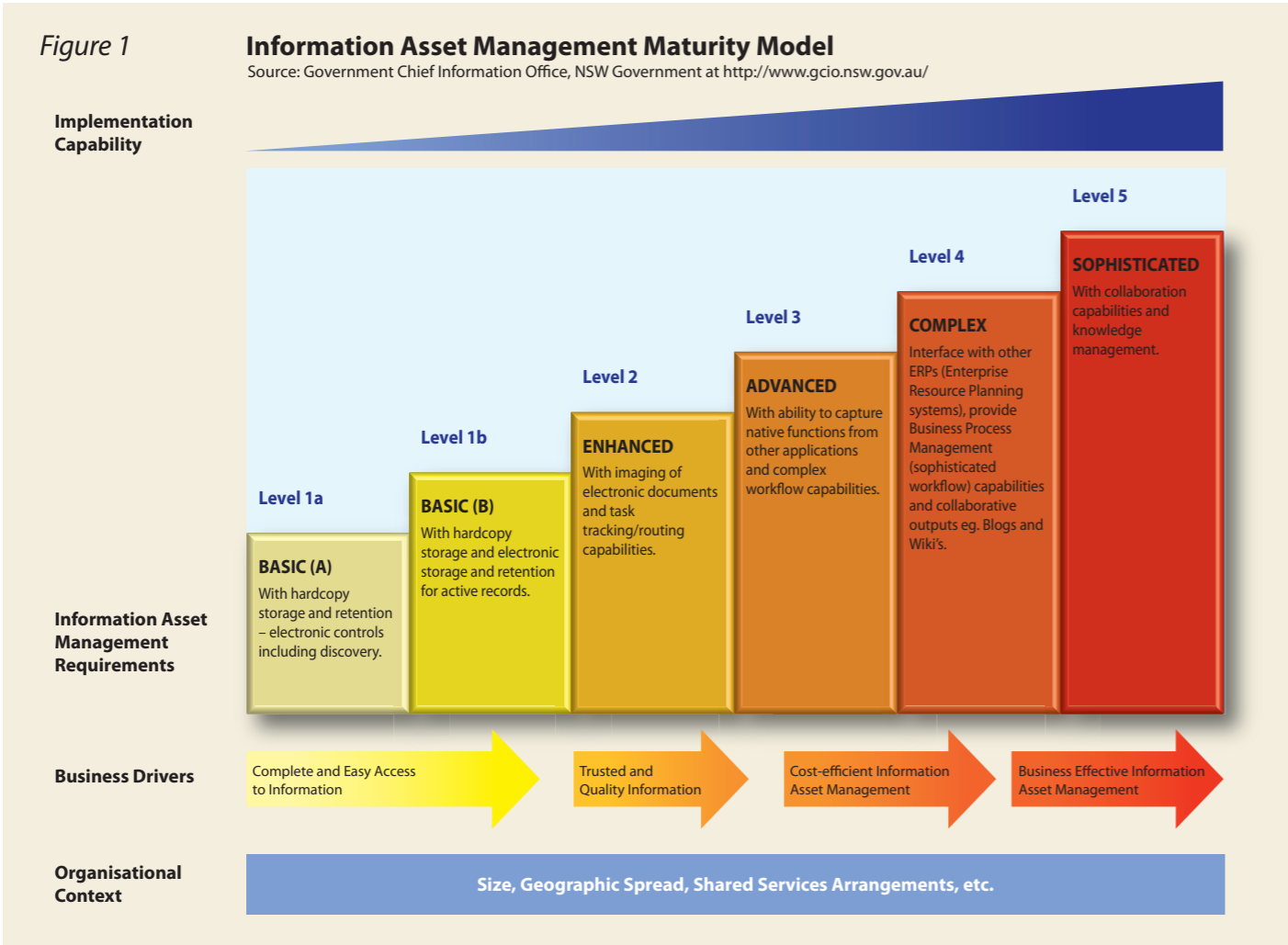
Many EDRMS projects are "led from the middle", making them highly susceptible to failure. Without senior management endorsement, the prioritisation of the project and provision of resources required over the typical 12 to 30 month timespan – both of which are prerequisites to success – have a high probability of being withdrawn. Senior managers generally support the idea of good recordkeeping and compliance, but do not know what is involved and do not understand the productivity that is unleashed by a successful project. At the other end of the spectrum, users tend to see an EDRMS project as just another compliance driven, administrative burden with little personal benefit. Getting engagement up and down the hierarchy is therefore fundamental to the success of an EDRMS implementation.

Engagement progresses through five levels. Change Factory can help you drive your organisation through each level of engagement (see Figure 2).

Figure 2 Levels of Engagement

Level 1	Understanding the change and the details of the program (the WHAT) Ensuring that everyone is clear about what the EDRMS programme involves by: <ul style="list-style-type: none">• Conducting a stakeholder analysis to determine levels of power and support.• Conducting a risk analysis to determine events and actions that are likely to happen and likely to affect the project.• Developing a communications strategy to determine the topics to be covered and what the audience should feel, think and do.
Level 2	Believing in the change (the WHY) and believing it will benefit them Conveying the benefits of EDRMS in a way that is relevant to employees, through communications and training. For example, by appealing to their personal frustrations: "Have you ever ... Searched for hours for a file? Wondered if you had the latest version of the important file you were working on? Wished you could track who had viewed those documents and when?"
Level 3	Prioritising and caring about the change (the WHEN) Developing training, tools and communications to enable employees to appreciate the advantages of EDRMS compared to the status quo. For example, through the use of case studies, calculators, change management tools, time management tools and training.
Level 4	Planning to make the change (the HOW, WHO and WHERE) Communicating the specifics of the system through the development of user-friendly tools. This allows employees to learn enough about the new processes to use them confidently and well.
Level 5	Implementing the change (the DO) Putting the plan into action and monitoring the success of the program.

Figure 1 Information Asset Management Maturity Model
Source: Government Chief Information Office, NSW Government at <http://www.gcio.nsw.gov.au/>



The Principles of Changing Individual Behaviour

In an EDRMS implementation, it's not enough to just get engagement of the organisation. Success rests on changing individual behaviours and habits. It's no easy task, and requires each of the following three principles to hold true:

1. The user needs to believe that the change is good for them. Adopting the EDRMS must be seen to be better than the status quo and better for the individual than most of the other initiatives and activities they are involved in. Communications must be highly visible and resonate with the user's daily life.
2. The user needs to believe that the new habits required of the new level of recordkeeping are the norm. Stakeholders with high power over the users' opinion must be converted into highly visible, active supporters.
3. The users must perceive they have capability, authority and data to execute the new behaviours successfully. Training should be multi-modal, engaging and fun. Technical and process support must also be readily available, and employees should feel empowered to take responsibility for correct use of the system.

Integrating Change Management and Training

The more that change management activities and training are integrated into a seamless whole, the greater the chance of success.

Training in EDRMS applications teaches new skills and knowledge. Change management introduces new behaviours. Combining the two into a complete strategy to improve the competence of users and senior managers alike creates the most supportive environment for success.

Change Factory has worked extremely successfully with, and recommends, Linked Training as our training partner. As a team, we were awarded the J. Eddis Linton Award for Excellence in Records Management – Most Outstanding Group.



Support Services: Internal Branding and Communications

To maximise the effectiveness of the communication plan, Change Factory offers a range of support services to develop an internal brand and communications campaign, such as:

- Communications planning
- Creating implementation strategy simulations
- Graphic design
 - Logos and internal branding
 - Brochures and posters
 - Word and PowerPoint template design (such as newsletters and letterheads)
 - User Guide design and production
- Animations and cartoons
- Web pages
- Video production (from storyboard creation to distribution).

We work with you to ensure that the key messages are communicated in the best way to reach your audience.

CONTACT US

To discuss how Change Factory can help you manage organisational change with your EDRMS implementation, please contact us at:

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