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## **Increasing ROI Through Pre-implementation Clean-up**

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ARMA-London, June 2, 2010 Session # W12

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## **Agenda**

- Introductions
- The Challenge
- The Solution
- The Lessons Learned
- The ROI

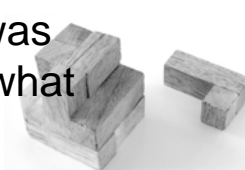


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## The Challenge

- 800,000 files “organized” by sector
- Attempts to manually reorganize had failed and was filled with risk
- Provision of guidance on clean-up had been attempted but uptake was poor
- Implementation of ECM was pending but no sense of what should be migrated




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## The Goal

- Ensure that all agency information was properly managed
- To create an intuitive and business driven file plan
- Support the RDIMS implementation




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## The Return on Investment

- Reduced storage space
  - Retention reporting has identified 28% can be removed
- Increased automation of migration
  - New folder structure linked to RDIMS profile screen
- Reduced frustration level

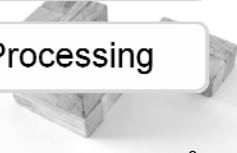


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## The Process

- 1 • File Plan Development
- 2 • File Transfer Chart (FTC) Development
- 3 • FTC Validation
- 4 • Automated Migration
- 5 • Retention and Disposition Processing




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### Lessons Learned/Best Practice – Communications

- Conduct a general project information session prior to focus group stage
- Develop communication kit
- Demonstrate the connection between reorganized shared drives and the ECM implementation




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### Lessons Learned/Best Practice – Analysis

- Identify all stakeholders prior to project launch
- Conduct IM Awareness Sessions with business units
- Capture technical constraints and requirement for their input and support in updating access rights



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## Lessons Learned/Best Practice – Mapping

- Develop approach for case management and project files
- Create separate mapping project for older files if staff has change
- Clearly identify how to handle anomalies such as personal files, temp files, etc.



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## Lessons Learned/Best Practice – Validation

- Ensure stakeholders are trained
- Provide means for capturing comments on mapping without allowing users to actually make changes
- Use impasses as an opportunity for discussion on the structure
- Include resources to provide support during validation process
- Develop a plan for dealing with older information




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## Lessons Learned/Best Practice – Migration

- Work with IT to do a full back-up
- Build out structure first (with option of building access rights in at this point)
- Migrate files using a “move” rather than a “copy” mode to reduce time and storage requirements
- Delete old structure from shared drive so users stop adding to it

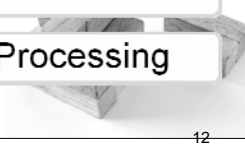


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## Modified process for rest of OPHP

- 1 • Communication Process
- 2 • Readiness and Implementation Plan
- 3 • File Plan Development
- 4 • File Transfer Chart (FTC) Development
- 5 • FTC Validation
- 6 • Automated Migration
- 7 • Retention and Disposition Processing



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# Questions

