Confessions of a Document Controller

Jessica Bianchessi
VP of Business Management Services
What is the difference between document control and information management?
• **Document Control** (DC) is a document management profession whose purpose is to enforce controlled processes and practices for the creation, review, modification, issuance, distribution and accessibility of documents

• **Information management** (IM) is the process of collecting, storing, managing and maintaining information in all its forms. Information management is a broad term that incorporates policies and procedures for centrally managing and sharing information among different individuals, organizations and/or information systems
I was a Document Controller

- **Document Control** - Multiple Projects
- Oil & Gas, Engineering Construction & Procurement (EPC) Company
- Customers were; ExxonMobil, Shell, Petrobras, ENI and many more...
I was assigned a mega project

- April 2005, Lead Document Controller, Agbami project
- 1st major deepwater, subsea project in Nigeria
- Restoring a relationship
- Best subsea technologies
We had to adhere to many information management requirements

- Complexities
- Requirements
- Document Management System
- Document naming conventions, title blocks
- Asset tag register
- Tyvek Paper!
We were not prepared
We thought we had the SOLUTION

- Bought Citadon CW, a document management system
- It will solve all our problems!
BUT, it did not solve anything

- No one wanted to use it
- Everyone hated it
- Documents control, training, customer support, confidant and babysitting...
- Please don’t quit!
I felt out of control

- Overworked
- Under stress
- Work life balance
Does anyone care about document control?

- Who cared about document control?
- Document Control review cycles – MONTHS
- Email SNEAKS
- Project Delays
Advanced Technologies

- Trees, topside controls, connectors and four-slot manifolds
- 4800 ft
- Bottom of the sea
Advanced Technologies
Have you ever felt this way, or experienced something similar?
I was an out of control, document controller
Managed to deliver, but...

- Behind schedule
- Over budget
I learned 2 things;

- We were behind the information management maturity curve!
- I NEVER want to be out of control again!
Jessica Bianchessi

- VP and Co-Founder
- Kinsmen Group - Optimize Engineering and Asset Information
- www.kinsmengroup.com
- Fun fact about me
Document control set my path

- Learned from first-hand experience
- Passion to help companies benefit information optimization
Why do you think we initially failed to use Citadon?
ARMA 2017 - Concurring the Seven Summits

- Paul Cheetham, Conquering the Seven Summits of EIM
- To get things right, you must look at many factors across the business
- Attendees?
Conquering the seven summits

• The Seven Summits are the highest mountains of each of the seven continents.

  ➢ Climbing all of them is regarded as a mountaineering challenge, first achieved on April 30, 1985 by Richard Bass.

• Conquering your DC and IM challenges is much like conquering the seven summits, there are multiple challenges to overcome.
### The Seven Summits Engineering Information Management Maturity Model

<table>
<thead>
<tr>
<th>Summit</th>
<th>Region</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kosciuszko</td>
<td>Australia</td>
<td>&quot;Anyone with a modest level of fitness can walk to the top of Mount Kosciuszko.&quot;</td>
</tr>
<tr>
<td>Vinson</td>
<td>Antarctica</td>
<td>&quot;Vinson offers little technical difficulty beyond the usual hazards of travel in Antarctica.&quot;</td>
</tr>
<tr>
<td>Elbrus</td>
<td>Europe</td>
<td>&quot;Elbrus is not technically difficult, but it is physically arduous because of the elevations &amp; the strong winds.&quot;</td>
</tr>
<tr>
<td>Kilimanjaro</td>
<td>Africa</td>
<td>&quot;Kilimanjaro requires appropriate research to ensure you are both properly equipped &amp; physically capable to climb.&quot;</td>
</tr>
<tr>
<td>Denali</td>
<td>North America</td>
<td>&quot;Denali is a tough expedition due to the need to carry heavy loads, &amp; the notoriously stormy weather that the peak attracts.&quot;</td>
</tr>
<tr>
<td>Aconcagua</td>
<td>South America</td>
<td>&quot;Aconcagua is the highest non-technical mountain in the world, &amp; the effects of altitude are severe.&quot;</td>
</tr>
<tr>
<td>Everest</td>
<td>Asia</td>
<td>&quot;Everest presents dangers such as altitude sickness, weather, wind as well as significant objective hazards.&quot;</td>
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</tbody>
</table>

### Key Aspects

<table>
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<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Who You Are</strong></td>
<td>Your people, structure &amp; management</td>
</tr>
<tr>
<td><strong>How You Manage</strong></td>
<td>Management of change effective at all levels, for all information sets. Clear visibility at all times on information validity and effectiveness.</td>
</tr>
<tr>
<td><strong>How You Do</strong></td>
<td>Processes right across the organization are effective and well defined. Constant evaluation and monitoring ensures adjustments can be made quickly and accurately.</td>
</tr>
<tr>
<td><strong>What You Use</strong></td>
<td>Your systems to manage &amp; share information</td>
</tr>
<tr>
<td><strong>How You Interact</strong></td>
<td>Your collaboration &amp; exchange practices</td>
</tr>
<tr>
<td><strong>How You Comply</strong></td>
<td>Your adherence to standards &amp; regulations</td>
</tr>
<tr>
<td><strong>How You Plan</strong></td>
<td>Senior management now exploit the information as a competitive advantage. The continually monitored strategy drives efficiencies and reduces risks.</td>
</tr>
</tbody>
</table>

### Effective
- Your people all contribute to maintaining your EIM strategy. Leaders seek outside guidance and follow industry trends and standards.
- Management of change is effective at all levels, for all information sets. Clear visibility at all times on information validity and effectiveness.
- Processes right across the organization are effective and well defined. Constant evaluation and monitoring ensure adjustments can be made quickly and accurately.
- Company-wide systems adoption ensures users are provided the right tools for the right job - so they can find what they need quickly and accurately.
- Whole lifecycle and best practice solutions that provide more than standard EIM features are assessed and implemented. Information architecture is supported from application architecture.
- Your processes are aligned and/or incorporate external contributions. You enforce strict standards on data fields, drawing blocks, numbering and audit trails through systems and quality checks.
- Senior management now recognizes information as a strategic asset, building a clear information strategy that supports the business strategy.

### Managed
- Well organized and clearly led groups coordinate all EIM activities across the organization. Department heads ensure alignment with all areas.
- Key sponsors and participants are allocated to cross-departmental initiatives on EIM. Decision makers are appointed.
- The organization attempts to formalize objectives for information sharing and management - but no change management exists.
- Processes become more robust and allow for repeatable work patterns - but remain localized to departments or teams.
- The IT organization starts to consolidate efforts across the organization.
- External information exchanges are handled via localized systems and solutions. No standards in place for effective data exchange.
- Governance teams are created to formulate a quality program. All key business units participate. Awareness of regulations increases significantly.
- A roadmap and vision for a company-wide EIM strategy is communicated across the board.

### Proactive
- Team members take ownership of their own information needs at the departmental level - and this harms wider objectives.
- Teams begin to request simple views of information from all sources, but cannot get them.
- Team members begin to document processes for knowledge sharing and onboarding purposes.
- IT tries to consolidate sites through the use of analytics, and knowledge sharing.
- Your teams engage with external partners and start to understand working practices and need of information sharing.
- Decisions are taken on independently presented solutions - there is still no ECM strategy.

### Reactive
- People drive personal ambitions to improve information management.
- Information is fragmented and unmanaged across sites.
- There is no appreciation of team needs and no clear leadership.
- There is no documentation of processes.
- There is no information architecture that exists to guide teams.
- There is no appreciation of external parties, processes or requirements.
- There is no information governance or knowledge of industry standards.
- Decisions are made without adequate information.

### Aware
- People drive personal ambitions to improve information management.
- Information is fragmented and unmanaged across sites.
- There is no documentation of processes.
- There is no information architecture that exists to guide teams.
- There is no appreciation of external parties, processes or requirements.
- There is no information governance or knowledge of industry standards.
- Decisions are made without adequate information.
Let's take an exercise!
Aware & Reactive

- Not ready!
Firefighting
After the project

- Created an Information Management Plan
- Defined requirements, and implemented solution
- Was involved in all bid activities
- Redefined document control processes
Moved to proactive

- We moved to Proactive
- Our first step towards Information Management excellence
- I left as the Information Manager to pursue a passion for optimizing information.
So, what is the most important element of the document control discipline?
YOU!
Someone has to speak up

- We aren’t going about this the right way.
- Everyone should know how important DC & IM is to the bottom line
How important is it?

- There are countless statistics out there...
- What if every person on your team, could be only a couple of hours more efficient?
- What if you could drive that kind of change?
Here are the risks

- Efficiency
- Productivity
- Compliance
- Cost
- SAFETY!
Perhaps, if someone would have said...

- BP Macondo Incident, GOM – many deaths
- Improper IM
- The team had succumbed to the normalization of deviance, setting aside data that didn’t conform to their expectations and relying on information that did.
Advocate for change

• Globally, we are cutting corners on how we manage our documents and our data.

• Let’s all be advocates for change!
Will you be an advocate for change?
- Kinsmen Group
- Survey
- Where’s the Fire eBook
- Confessions of a Document Controller eBook