November Luncheon Speaker:

Kedar Thakker IGP
Oh! But what about the prerequisites?

Kedar Thakkar IGP, CIP

http://platinumcfo.com/2017/12/small-business-year-end-checklist/
KEDAR THAKKAR IGP, CIP

• 20+ years of experience in various roles including RIM practitioner, IG Consulting and IT administration & architecture

• Develops robust IG programs where information assets are identified, protected and leveraged for value.

• Experienced in addressing IG concerns throughout corporate acquisitions, facility closures and technology transformations.
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Understanding the topic...

1. WHAT IS OUT OF SCOPE
2. WHAT IS IN SCOPE
3. EXAMPLES
4. WHY

Information in Action
1. WHAT IS OUT OF SCOPE

- Business Case & ROI
- Approval Process
- Resource Requirements
- Budget
- Support Structure

INFORMATION IN ACTION
Information Governance is People, Process and Technology – in that order!

**Existing Tools/Technology**
- ECM/DM Solution
- Existing Infrastructure
- Tools/Connectors/Adapters

**Foundational Projects**
- Updated Retention Schedule
- Document Types Identified
- Document Types matched with Record Series

**Strategy/Roadmap Dependencies**
- Implementation Strategy
- Integration with other systems (existing or future)
- Migration Strategy
- Information Security & Access Strategy
- Records within Email

**Policy, Procedure & Governance**
- Checklist of existing policies
- Gaps and missing policies
- Governance strategies in place
**EXISTING TOOLS/TECHNOLOGY**
- ECM/DM/RM Solution
- Existing Infrastructure
- Tools/Connectors/Adapters
- Electronic/Digital Signature

**FOUNDATIONAL PROJECTS**
- Clause Library
- Signing Authority, Thresholds, Permissions
- Approved Vendor List
- New Vendor Approval Process
- Contract Types, Metadata

**STRATEGY/ROADMAP DEPENDENCIES**
- Implementation Strategy
- Integration with Other Systems (Existing or Future)
- Information Security & Access Strategy
- Importing Existing Contracts

**POLICY, PROCEDURE & GOVERNANCE**
- Checklist of Existing Policies
- Contracts Approval Process
- Signing Authority
- Paperless/Automation
WHY CONSIDER THESE PREREQUISITES?
Why consider these prerequisites?

1. Total Implementation Timeline

- 2019
- 2020
- 2021
- 2022

2. Benefits of Tool/Technology

Benefits


Information in Action
**WHY CONSIDER THESE PREREQUISITES?**

3. **User Adoption/Push Back**

4. **Total Cost of Implementation**

WHY CONSIDER THESE PREREQUISITES?

5  IMPACT ON FUTURE CREDIBILITY

6  VENDOR MISTRUST

THE GOAL: TRUSTED PARTNERSHIPS
Where commitment, courage, focus, openness, and respect are abundant.

Relationships are based on...

Trust is based on demonstrated...

Credibility is based on...

PAST PERFORMANCE [TRANSACTIONS]

Source: Genesis10

Why consider these prerequisites?

7. Unable to achieve the Goal

8. Impact on Strategy/Roadmap

https://cdn.iconscout.com/icon/premium/png-256-thumb/financial-strategy-536781.png
**Why consider these prerequisites?**

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<thead>
<tr>
<th></th>
<th>Total Implementation Timeline</th>
<th>Benefits of Tool/Technology</th>
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<tbody>
<tr>
<td>3</td>
<td>User Adoption/Push Back</td>
<td>Total Cost of Implementation</td>
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<tr>
<td>5</td>
<td>Impact on Future Credibility</td>
<td>Vendor Mistrust</td>
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"THANKS FOR THE 'I-TOLD-YOU-SO' CARD."
Thank you!
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