ARMA International
Washington, DC Chapter

Change Management Seminar

Using Change Management to Facilitate Enterprise RIM Implementation
Defining the Problem

How do we move from design to actual implementation?
The Easy Part

- Writing a Policy Statement
- Creating Procedures
- Developing a Retention Schedule
What’s the Hard Part?

• Enterprise Implementation
Why is Implementation so Hard?

- Everyone is Competing for
  - Management Attention
  - Staff Resources
  - Financial Resources
- No Reward for Compliance
- No Penalty for Not Doing It
What We Need to Do

- Get Everyone’s Attention
- Convince the User to Want It
- Create Rewards
- Create Penalties
Assess Your Organization

• What is Important to Everyone?
• Understand What Worked Before
• Know What Succeeded
• Know Why it Succeeded
• Know Who Made it Work
• Build on Success
Make RIM Important

• Make RIM Important to Everyone
• To Leadership
• To Middle Management
• To End Users
Change the Way They Think

• Create a Sense of Importance
• Make RIM a Front Brain Issue
• A Little Fear is a Good Thing
How to Effect Change

- Find the Hot Buttons
- Make it Personal
- Create a Sense of Urgency
Link RIM to Critical Objectives

- Target Difference Audiences
- Understand What They Focus On
  - Leadership
  - Middle Management
  - End-Users (more than one?)
Leadership’s Issues

- Risk Management
- Cost Containment
- Litigation Profile
- Board Perception
- Shareholder Value
Middle Management’s Issues

- Visibility
- Track Record
- Meeting Objectives
- Leadership Perception
End Users’ Issues

• Make my day easier
• Make my boss happy
• Keep my job
• Get a raise?
Leadership – Drill Down

- Risk Management
- Perception
- RIM Compliance
- Litigation
- Cost Containment
- Business Continuity
- Shareholder Value
Middle Management – Drill Down

- How Do I Compare?
- Am I Sharing Values?
- Am I Seen as Performing?
- Am I Seen as Part of the Team?
End Users – Drill Down

- What Does My Boss Look for?
- Make it Easier
- Don’t Add Overhead
- How Does it Impact my Review?
- Can it Get Me a Raise?
Delivering to Leadership

• High Profile Context
• Respected Courier
• Brief
• Keep It High Level
• PPT
• Supporting Collateral
• Follow Up
  – Thanks and here’s more if you need it!
Delivering to Middle Management

• Small Group Briefings
• Stress the Leadership Message
• Content “Just for You!”
• Post to the RIM site
• Follow up
  – Thanks
  – Summary docs and here’s more!
Delivering to End Users

• Hosted Computer Based Training
• Lots of Tools
• Load Content to the RIM site
• Test and Follow-up
• Audit
Keeping RIM Visible

• Audit
  – Internal Audit
  – IT
  – RIM
  – Third Party
• Keep it Personal
• Offer Help
• Stay in Touch
Change the Way They Think

Questions?
Presented by

• George Cunningham
• PelliGroup
• www.pelligroup.com
• 804-843-2882
• gccunningham@pelligroup.com

– A Promise of Value –