CASE STUDY

1,438% ROI Realized With New Technical Records Program

INDUSTRY
Power & Utilities

COUNTRY
Canada

Access Sciences

Records management programs tend to focus on the legal consequences of not keeping records that should be retained, or retaining records that should be destroyed. *Technical records are a different matter*. In addition to satisfying legal and regulatory requirements, accurate technical records can save hundreds of thousands of dollars in material and equipment costs, eliminate hundreds of hours of rework, and in some cases, have significant safety implications. Unfortunately, the true value of technical records is most apparent when they cannot be found.

SERVICES DELIVERED:

- Engineering Information Management

- Policy and Process Development

- Program Assessment and Roadmap

- Program Design and Implementation

ISSUE

Lack of comprehensive technical records and information program

The client was in the early stages of developing a comprehensive and systematic program to manage technical records and information, and engaged Access Sciences to assist with selecting a content management platform, perform a baseline assessment and gap analysis of technical records management, and develop a multi-year roadmap for implementing the program.

INTERVIEWS AND ELBOW GREASE

The primary users of this client's technical records management program are those who create, manage and use records relating to the gas carrying assets, typically workers in distribution operations and engineering, construction, and storage.

- As part of the assessment, Access Sciences completed a content review of corporate policy and procedures documentation, reviewed industry standards, and conducted interviews with employees from functional groups and departments that work with engineering and technical records, or that rely heavily on technical information

created by others.

- Our team also used records and information management assessment tools, such as ISO 15489, the ARMA Records Management Maturity Model, and ARMA Generally Accepted Record keeping Principles® to assess the client's current state of technical records management, and to identify gaps in current policies, processes, procedures, and roles.

SOUND MANAGEMENT OF TECHNICAL RECORDS REDUCES COSTS AND RISKS, AND IMPROVES PRODUCTIVITY

Typical of this industry, the client has an embedded culture of safety. In addition, they now embrace the belief that sound management of technical records reduces costs and risks and improves productivity.

The Baseline Assessment and Gap Analysis resulted in the identification of several key areas needing improvement, including:

• Roles and Responsibilities	• Oversight of Policies and Procedures	• Retention Requirements
• Training on Life-cycle Management of Technical Records	• Standard Naming Conventions and Metadata	• Cross-Functional Project Communication
• Process and Procedure Documentation	• Information and Document Control	• Record Storage and Security
• Design Control	• Managing Technical Information as an Asset	

SOLUTION

☑ Access Sciences designed a multi-year, systematic roadmap to help a client implement a records management platform

BENEFIT

☑ This client has realized an estimated cost savings of $115M and an ROI of 1,438%

The Roadmap focused on activities to move the client from current state to future goal for developing and managing the technical records management program, implementing the program to manage technical records, deploying and managing technology tools, and finally managing the cultural change.