

CASE STUDY

Content Migration on a Massive Scale

● **INDUSTRY**
Energy

● **COUNTRY**
USA



A publicly-traded company with operations in 13 states has grown rapidly in recent years. Along with this growth and financial prosperity came the realization that responsibly managing the company's information is complicated. This complexity is compounded by the fact that much of their growth has come through acquisition, and no two companies manage their information in the same way.

To reduce the number of ways in which they manage their information, the client decided to migrate current records and documents from existing network file shares to their SharePoint Enterprise Content Management platform. Key records were lost amidst the larger number of obsolete, duplicate, or otherwise unimportant files that accumulate in corporate file shares over time. File organization varied from consistent sets of folders and file names that provide

a clear index to the content, to less-obvious naming conventions that have been built over time by employees no longer available to explain their meaning. For example, the Contract Administration file structure contained approximately 24,000 folders and 46,800 files.

Because of the volume of records and the complexity of the file share folder structures, this project was overwhelming to the end users. Access Sciences created a methodology and project timeline that eased concerns and set expectations about the work ahead for the employees.

ISSUE

A services company needed to migrate information without affecting ongoing operations

SERVICES DELIVERED:

- Change Management
- Content Analysis
- Content Migration
- SharePoint for Records

HOW TO COMMUNICATE A SUPERHUMAN EFFORT

Employees recognized the herculean effort that they had been tasked with. They not only

had to review thousands of files and migrate the appropriate ones to SharePoint, they had to do so while still performing their daily jobs. Early in the project, the work effort and time to completion for the migration work was grossly underestimated by the client. Access Sciences saw the need to create an awareness program to inform end users of exactly what was going to be asked of them, how much time it was realistically going to take, and to create a realistic migration schedule.

The awareness program included an on-boarding script to kick-off the activities of the project, including messaging describing, "here is what we need, by when, and why." We know that the important lead-in for communicating change is the "why" of doing something. Equally important is making line managers aware of the support for this initiative from executive leadership. Workgroup level managers were coached to make sure they understood the scope of the project and what was involved and expected of them. Managers were

required to sign-off on the schedule that gave both implementors and end users the reassurance that this initiative was a priority. Once the managers were on board, they had to communicate to their people that even though the effort was going to be a big ask, they were the Subject Matter Experts (SMEs) for their content and they had to be engaged to make sure the migration was successful.

SOLUTION

- ✔ Bring Change Management to a complex data migration process to help the company responsibly manage their information
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BENEFITS

- ✔ Improved end user buy-in.
 - ✔ Working with line managers to set a reasonable time-frame eased end user's concerns about the work effort ahead of them.
 - ✔ Thoughtful and well-timed project communication removed "fear of the unknown."
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REASONABLE EXPECTATIONS BRINGS ABOUT SUCCESS

"We can do this on our own." This was a direct quote from the client at the beginning

of the project, but he later acknowledged that this assumption drastically underestimated the amount of change management needed to realize the goals of the project. What made this project a success was working one-on-one with content SMEs and their managers to make sure they were prepared for the expected work. The result was that the right content was moved from disorganized file shares into a new system where it was correctly tagged and identified so that it was findable across the organization.