



Records management: Career and business opportunities

RIMAW 2010
Lagos, Nigeria

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Agenda

- Defining the industry
- Overlaps and convergence
- Critical success factors
- New skills required
- Career and business opportunities
- Conclusion



What exactly are we talking about?

Information Management

Document
Management

Records
Management

Enterprise
Content
Management

Knowledge
Management

Archival
science

Library
science

science
library



Defining the industry

- Information management (IM) is the collection and management of information from one or more sources and the distribution of that information to one or more audiences.
- In short, information management entails organizing, retrieving, acquiring and maintaining information.



Records Management

- "The field of management responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records, including the processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records".



Records Management

A Records Manager is responsible for:

- Planning the information needs of an organization
- Identifying information requiring capture
- Creating, approving, and enforcing policies and practices regarding records, including their organization and disposal
- Developing a records storage plan, which includes the short and long-term housing of physical records and digital information



Records Management

A Records Manager is responsible for:

- Identifying, classifying, and storing records
- Coordinating access to records internally and outside of the organization, balancing the requirements of business confidentiality, data privacy, and public access.
- Executing a retention policy on the disposal of records which are no longer required for operational reasons; according to organizational policies, statutory requirements, and other regulations
- This may involve either their destruction or permanent preservation in an [archive](#).



Records Management

- Records management principles and automated records management systems aid in the capture, classification, and on-going management of records throughout their lifecycle. Such a system may be paper based (such as index cards as used in a library), or may be a computer system, such as an electronic records management application.
- ISO 15489:2001 states that records management includes:
 - setting policies and standards;
 - assigning responsibilities and authorities;



Records Management

- establishing and promulgating procedures and guidelines;
- providing a range of services relating to the management and use of records;
- designing, implementing and administering specialized systems for managing records; and
- integrating records management into business systems and processes.



Archival

- Archival science is the theory and study of the safe storage, cataloguing and retrieval of documents and items
- The field also includes the study of traditional and electronic catalogue storage methods, digital preservation and the long range impact of all types of storage programs



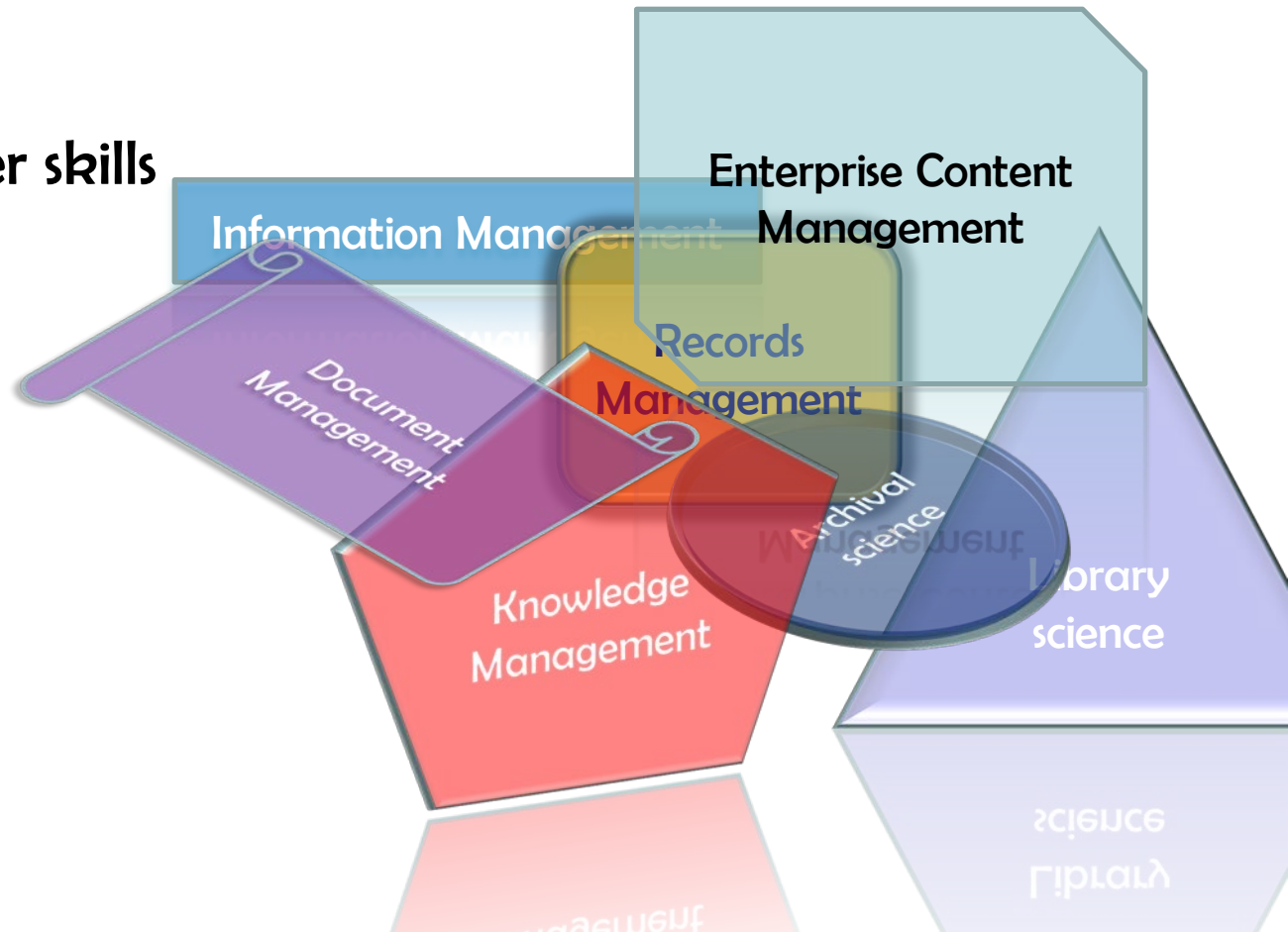
Enterprise Content Management

- **Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists**



Does the industry look more like this?

- Clear boundaries, yet..
- Lots of overlap
- Common skills
- Ability to transfer skills across domains





Common threads

- “Information” needs to be managed across a lifecycle
- From creation through to disposition
- It must be classified, stored, used
- It is increasingly on multiple formats (primarily, but not only paper and digital)
- **Users** are distinct from **creators**, who are distinct from **those tasked with managing** the information



Common threads

- The information is only as good as it's weakest link (Dependence on previous activities).
 - An incorrect version stored in a document management system has little value as a record.
 - An incomplete record has little value as an archive
 - A damaged record may not have validity in court
 - Cannot be used in a knowledge management environment unless accurate and complete



Common threads

- Many of the skills required are similar:
- Classification and indexing/identifying
- Analysis and interpretation
- Understanding of the usage of the information in a particular context
- Usage of the systems to manage the information
- Protection and security (physical and digital)



Common threads

- Interaction with users
- Ensuring that users comply with rules and policy
- Ensuring consistency in management of information
- Sharing of similar “critical success factors”



Critical success factors

- **Management buy-in**
 - To the programme
 - Understanding of the value of the information
 - Provision of budget and other resources
- **Change management**
 - Ensuring that users:
 - Manage information in the required manner
 - Are aware of their responsibilities
 - Have the necessary tools at their disposal



Critical success factors

- **Management of all information on all media, in all formats, in all locations, from creation to disposition**
- **Properly planned, implemented and managed programmes using project management thinking**





“New” skills required

- **The Records and Information management professional of the future needs:**
 - Change management skills
 - Marketing ability to sell the concepts and requirements to users and management
 - Ability to communicate at all levels
 - Project management planning and implementation skills



“New” skills required

- The Records and Information management professional of the future needs:
 - A high level of computer literacy
 - Negotiation skills
 - Political skills to sell the many different benefits and compliance requirements to different audiences





Career opportunities

- It is up to you whether the changing game is a threat or an opportunity.
- The traditional “back-room” staff approach is at risk
- Records management must be visible, tangible and valuable in the organisation or it will be at threat.
- RIM professionals have to move out of the basement



Career opportunities

- Digital records WILL become more prevalent whether we like it or not
- New media, new technologies (e-mail, social networking, mobile) WILL continue to come
- They WILL constantly create new challenges
- Paper records WILL be with us for some time still, and still need to be managed
- The transition from paper to digital WILL become more important



Career opportunities

- Specialisation is still a valid option
- But ignorance of the related fields is not.
- Records and Information Management *for the brave-hearted* is more exciting now and offers more potential than ever before



Questions?



Unfortunately I can't be here to ask questions.

Please continue this discussion on:

www.corconcepts.co.za/recordsmanagementforum

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