

Talking to Stakeholders about Electronic Records

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What's the plan?

- Discussion of three key stakeholder groups
- “Speed dating”
- Feedback and open discussion
- Sit back and count the money

Why we are doing this, again?

- We know e-records are important, but do others?
- “One size fits all” not a viable strategy



Stakeholder Group 1: Records Creators



Records Creator Concerns

- Legal compliance
- Business efficiency and decreased costs
- Active business processes (not long term)

RC Engagement Points

- Help to apply the Records Retention Schedule
- Act as ally and advisor on e-record legal issues
- Discuss costs and consequences of poor e-records management
- E-records management = records management
- Planning for obsolescence and migration

Tripping Points

- Collaboration with IT crucial, but not an “IT Problem”
- Historical value not high priority
- Don't overwhelm with information

Stakeholder Group 2: Administrators



Administrator Concerns

- Legal compliance
- Business efficiency
- Institutional mission and reputation
- Costs: bottom line
- Accountability, transparency, and good government/management initiatives

Administrator Engagement Points

- Discussion of applicable records laws
- Transparency/accountability & good RM
- Increased efficiency
- Costs of FOIA, e-discovery, lost productivity
- Better management = better access = better PR
- Specific examples from their organization

Tripping Points

- Don't get overly technical
- Don't be a scold or adversary- you are there to help protect them from other risks
- Express needs without looking hapless- mention current successes
- Avoid historical value argument- sounds like a luxury

Stakeholder Group 3: I.T.



IT Concerns

- Storage and management costs
- Compliance with security standards
- Keeping systems running efficiently
- Best practices

IT Engagement Points

- Discussion of long-term technical concerns, e.g. formats, storage media, backup strategies
- Governance strategy, involvement with creators
- ASK and LEARN about IT infrastructure
- How can current infrastructure be used for better RM?
- Discuss work of experts in the field, organizations like NASCIO

Tripping Points

- Long term preservation not primary focus
- IT jargon and computer knowledge
- High rate of IT staff turnover, particularly in CIO position

Time to Practice

- Three scenarios relating to different groups
- Partner up and practice your best arguments (3 minutes each)
- Rotate to the next station, select a different partner

Further Considerations and Discussion

- Do your background research
- Aim for low-hanging fruit first
- Start the conversation and be persistent
- Be flexible and adapt

Successful messaging leads to allies