

South African Society of
Archivists

Records Management: Getting management buy-in

ANNUAL CONFERENCE ON
“DIGITAL TRANSFORMATION FOR EASE OF ARCHIVES
GLOBAL ACCESS”

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Paul Mullan

paulm@corconcepts.co.za

+27 832736087

www.corconcepts.co.za





Agenda

- Understanding the challenge
- Options for achieving buy-in
- A formalised approach
- Questions



Adoption and Change Management

- Is the single most important part of your records management and digital transformation journey
- Make sure you allocate resources appropriately.

The process, tools and techniques to manage the people side of change to achieve the required business results.



Understanding the challenge

Most commonly heard:

**“I don’t get
management support
and resources to do my
job!”**



**Let’s ask ourselves
why:**

- They don’t understand the importance of records management
- We don’t speak the language of the business
- They have other priorities
- They don’t listen to us
- We’ve been telling them for years....



So, what's the real problem

“Other things are seen as more important or more urgent”

We can't explain:

1. the importance,
2. to the right people,
3. in the right language

Let's ask ourselves:

- Who are the decision makers?
- Who are the influencers?
- What is important to the people with the funding?
- What are the current priorities?
- How does records management support that?
- How can we elevate the importance and priority?
- How can we craft messages that resonate?
- How do we get to the decision makers?
- Who do they listen to?



How does Records Management or Digital Transformation support the organisation?

Using a Municipality as an example.

The language of Government

1. Delivery of basic services
2. Job Creation
3. Growing the Economy
4. Growing SMME's
5. Education and skills development
6. Human settlements
7. A peaceful province
8. Caring and incorruptible government
9. Compliance to legislation?
10. Good corporate Governance?

The language of Records Management

1. We need a file plan
2. We don't have disposal authority
3. Users aren't allocating file plan reference numbers
4. We don't have storage space
5. We are running out of stationery
6. We don't have time to catch up the back-log.
7. Users aren't sending the files to us.
8. We can't go electronic because of loadshedding
9. Auditors need paper
10. Business loses documents



Align Digital Transformation to the strategy

- Show how records management or digital transformation will assist the stakeholders in each key area (For example):

Strategic Goal	Alignment of Digital Transformation to the strategic goals
Improving delivery of basic services	• Digital Transformation will assist in reducing the costs of storing information. • Information is made available immediately to field workers delivering services. • Information is easily found and shared with authorised people, reducing the time spent in searching for and retrieving it. The latest copies are captured, preventing rework. • Active documents and drafts are captured and stored in protected environments early in the business processes, reducing the potential for loss and resultant rework. • Information is stored in appropriate locations and media which supports its legal, admissibility, retention and availability requirements • Information is managed such that it is easily searchable and retrievable in the event of queries, investigations, hearings and court cases, reducing the costs of discovery.



Overcoming resistance and obtaining buy-in

Identify the business issues

- For each business units
- Internal (staff)
- External (citizens)
- Other stakeholders (Regulators)

Identify and document how records management can help the business achieve their goals.

- Lower costs
- More effective use of budget
- Streamlined processes
- Reduced audit findings

Identify who needs to get the message

- Executive management
- Heads of Department
- The MM or DG
- Your manager?
- Yourself?
- Your staff?

Identify who can get the message across to the right people

- Your manager
- Their manager
- The Provincial Archivist
- The Auditor General
- The Information Regulator
- External consultants



Overcoming resistance and obtaining buy-in

Communication Frequency

- Create a communications plan
- Create a set of messages
- How often
- For what duration

Communication Methods

- E-mail
- Newsletters
- Intranet
- Meetings

Opportunities for feedback

- Business analysis sessions
- Suggestions box
- Forums
- Provide feedback
- Advertise wins, benefits and success stories



Summary

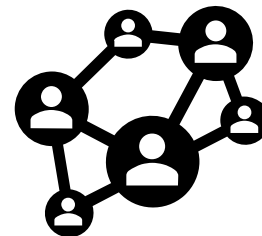
- Align your objectives to the business objectives
- Speak the language of business
- Have a formal plan
- Don't do it alone
- Use the people who can assist you to get what you need.



Join me on social media and we'll work together to resolve this issue



Discussion and questions



Paul Mullan
0832736087
paulm@corconcepts.co.za