



5 Steps to Doing Information Right

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Step 1

Talk Up the Benefits



Puts Your Information to Work

You Captured It For a Reason, Right?

A client once said, “We no longer want content to be a passive resource, filed away awaiting retrieval.” And you don’t either!

Even if it’s just sitting there collecting dust, you collected your information for a reason: to sign a new customer, or to process an invoice, or to respond to a compliance audit. But you can’t do any of this properly without mechanisms to ensure that it’s accurate, or that it gets to the right people, or that you can find it again later on.

So capturing information is one thing – and governing it so it can be put to use is something else altogether!

Here are just a few featured benefits of Doing Information Right:

- *Improve customer service*
- *Lower compliance costs*
- *Increase productivity*
- *Foster collaboration and innovation*



Opens Your Information to Analysis & Insight

It's a Gold Mine of Intelligence

The information you possess is a gold mine of intelligence, as it contains all kinds of data about your business: who your customers are and their buying behaviors, where you are operating efficiently and where improvements can be made, which records legally must be kept and which can be disposed of, etc.

Tagging it so it can be synthesized and analyzed is key to developing the insights you need to make smart decisions and set successful strategies. Happily, the raw information required to support these outcomes is sitting there already, just waiting to be mined and leveraged.

Here are just a few featured benefits of Doing Information Right:

- *Shorten time to market*
- *Identify opportunities for customer upselling*
- *Speed responses to audit and discovery requests*
- *Cull expired records to reduce litigation risk*



Assures Your Information Excellence & Security

Quality + Integrity = Maximum Value

With information security breaches in the headlines nearly every day, we don't have to tell you how important it is to protect your data from outside eyes.

But the same is true when it comes to inside misuse – a term we use not only to encompass illicit sharing, but also the failure to ensure the accuracy and integrity of your information.

Controls must be placed, therefore, not only on access, but on editing and distribution as well. This is how you ensure information quality and value!

Here are just a few featured benefits of Doing Information Right:

- *Minimize the risk of being breached*
- *Protect personally identifiable information*
- *Ensure access by authorized users only*
- *Validate currency and accuracy*





Step 2

Take Stock



Where Are We Now? Where Are We Going?

Just as it is when planning a physical journey, the first step on the way toward information governance success is to determine where you're starting from and where you want to end up.

Otherwise, there's really no way to know whether you're making any progress!

A big part of this involves figuring out what's working and what isn't, for fixing the "what isn't" is a significant part of the work you'll have to do. It may be cultural, procedural, technical, or a combination of the three, and you can't address it if you don't know what it is.

We recommend these Holly Group tools to support you in this step:

- [Current State Quickscan Analysis](#)
- [MAXTV® Value Methodology](#)



Step 3

Develop Your Road Map



How Do We Get From Today to Tomorrow?

With your direction now set, the next step is to identify the gaps that separate your Current State of affairs from your desired Future State. Done properly, this not only results in a thorough “to do” list, but also helps you determine in what order these gaps ought to be filled.

There are typically so many tasks to be completed that prioritizing them – and/or the departments or operating areas affected by your initiative – is critical to your overall success.

After all, you can’t do everything all at once – and you shouldn’t try.

We recommend these Holly Group tools to support you in this step:

- [Information Governance Gap Analysis](#)
- [Enterprise Information Maturity Model \(EIM³\)](#)



Step 4

Stay the Course



How Can We Maintain Our Focus?

The work required to move from your Current State to your desired Future State is multidimensional and challenging, as it calls for the evaluation – and, often, complete rethinking – of your core policies and processes, and the human behaviors and computing technologies that make them go.

To avoid getting lost in the weeds, you must commit to proceeding methodically through the to-do list – keeping your ultimate destination in mind at every stage. This way you can adjust your course if you find the mass of detail is causing the compass needle to drift ... or change your destination entirely if your original objective turns out to be impractical.

We recommend these Holly Group tools to support you in this step:

- *Change Management*
- *Policy Review*
- *Process Analysis*
- *RFP Creation*
- *Information Architecture Evaluation*
- *Metadata Planning*
- *Technology Assessment*
- *Vendor Selection*



Step 5

Keep it Going



How Do We Sustain Our Success?

The commitment you make to seeing the tasks through must include cycles of review-and-revise. Your operating environment will morph with time, and the work you do now will be out of date before you know it.

Rather than see all your effort go to waste, do what smart organizations do to sustain their successes: regularly review the progress you've made and adjust your plan according to what you find.

Maybe this entails launching a Phase Two (or Three, or Four), or perhaps making simple tweaks. Either way, circling back on a regular basis is a critical part of realizing your governance goals, and avoiding the consequences suffered by those who skip this critical step.

We recommend these Holly Group tools to support you in this stage:

- [Information Governance Program Creation](#)
- [Semiannual Progress Review](#)



What Do We Do Next?

The great thing about these 5 Steps is that you can jump into them regardless of where you are in your information initiative.

- If you're just getting started, then begin with Step 1.
- If you're already underway, then take the Step that best addresses your current place in the process.
- And if you're not quite sure what to do – or simply desire some expert coaching or experienced hands – then give us a shout. Because that's what we're here for!

Holly Group exists solely to support your information planning, policies, procedures, and technologies.

We apply the latest best-practices to everything from your strategy development to your needs analysis, vendor selection, user adoption, and ongoing improvement.

And perhaps best of all, *we accept no vendor commissions – ever.* So you can believe it when we say our only consideration is your best interest.



So let's get started, together!

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About the Author



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Steve Weissman is a highly-credentialed consultant, analyst, instructor, and speaker in information strategy, information and process management, business-minded needs assessment, and RFP development.

Known as The Info Gov Guy™, he is a recipient of the AllM Award of Merit and a member of the AllM Company of Fellows. Co-Founder of the Information Coalition (now merged with ARMA), he has a 25-year track record of supporting organizations that demand Maximum Total Value from their information and information technologies.

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About Holly Group

Holly Group helps you do information right by bringing order and discipline to your governance and process practices. Our goal is the same as yours: to enable you to find, leverage, and protect your business-critical information. To learn more, please visit www.hollygroup.com or call 617-383-4655.