



Records Management For Project Managers?

The Imperative For Managing Project Artifacts Effectively

by Russell Stalters

On Time, On Budget, On Target...Every Time!



Records Management Is The Last Thing On A Project Manager's Mind



**Records
Management
Could Be One
of The
Most
Important
Tasks**



**Project
Managers
May Not
Know Why
Records
Management
is So
Important**



**But They Can
Quickly
Understand
Records
Management &
Address This
Important Need**



**Follow These Steps To Add
Effective Records Management
For Better Projects**

Understand How Records Differ From
Documents & Which Project Artifacts
Should Be Managed As Records

Take Advantage of Available
Resources & Additional Training To
Add This Skill To Your Expertise

Understand The Business Reasons
For Records Management &
Communicate This Value To Your
Project Sponsor

Understand How Records Differ From Documents &...

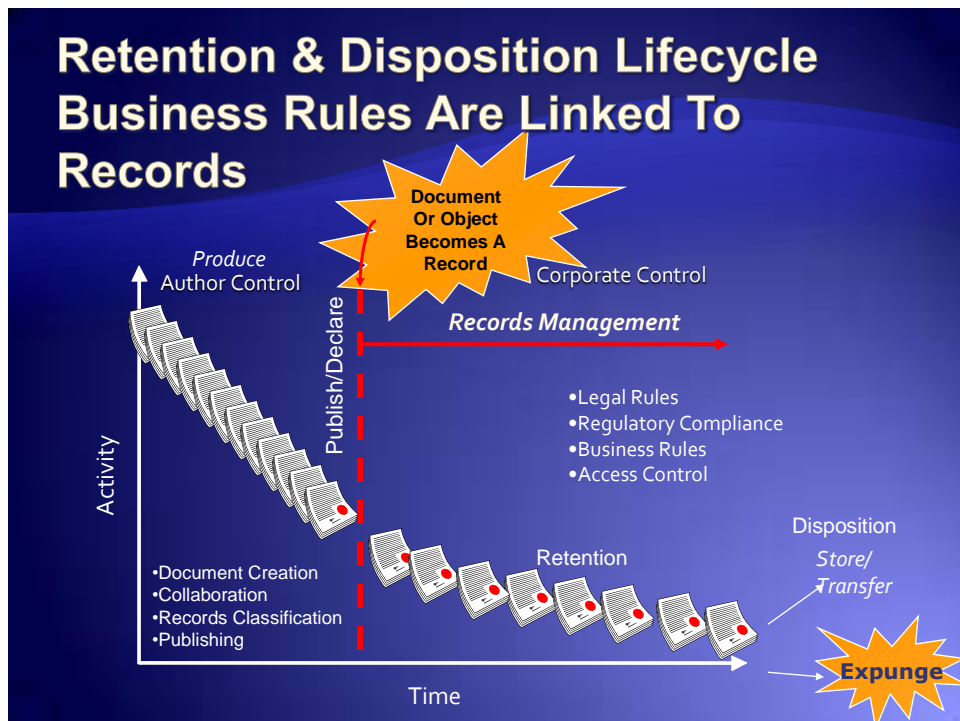


Which Project Artifacts Should Be Managed As Records

Records Are Made Unalterable & Have Specific Lifecycle Business Rules



Content Is Stored In A Secure & Immutable Repository



Legal Hold Capabilities Are Provided For Records



Project Records May Become Subject of Discovery or Audits



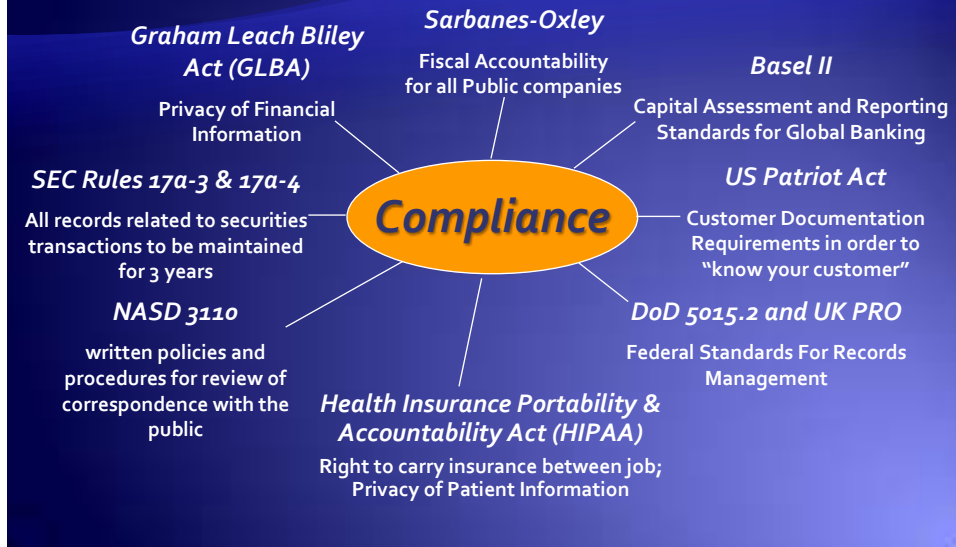
Project Records Could Become The Subject of Litigation



Audits Are Used To Confirm Decisions Made By Project Team or Other Decision Authorities



Audits Also Used To Support Proof of Regulatory Compliance





**Project
Schedules,
Steering
Committee
Minutes,
Deliverables,
Financial
Reports, etc.**



**Take Advantage of Resources
& Additional Training To Add
This Skill To Your Expertise**



Use ARMA, AIIM, Other Online Resources



ARMA Provides: Web Seminars, Online Learning, Monthly Journal



AIIM Provides: Web Seminars, Articles, Research, Certifications, AIIM E-DOC Magazine



NARA National Archives of Australia; Canada; UK & Many Others; Blogs; RM Listserv



Seek Guidance From The Organization's Records Manager



Add The Records Manager To The Project Team



Get a Copy of The Organization's File Plan & Records Schedule



**Inquire About
Any Existing
Records
Management
Solution**



Take Additional Training – Webcasts and/or Conferences



AIIM & ARMA Provide Regular Web Seminars



AIIM, ARMA, & Other Regional & International Conferences Are Available



Many Online Interactive Courses Are Available





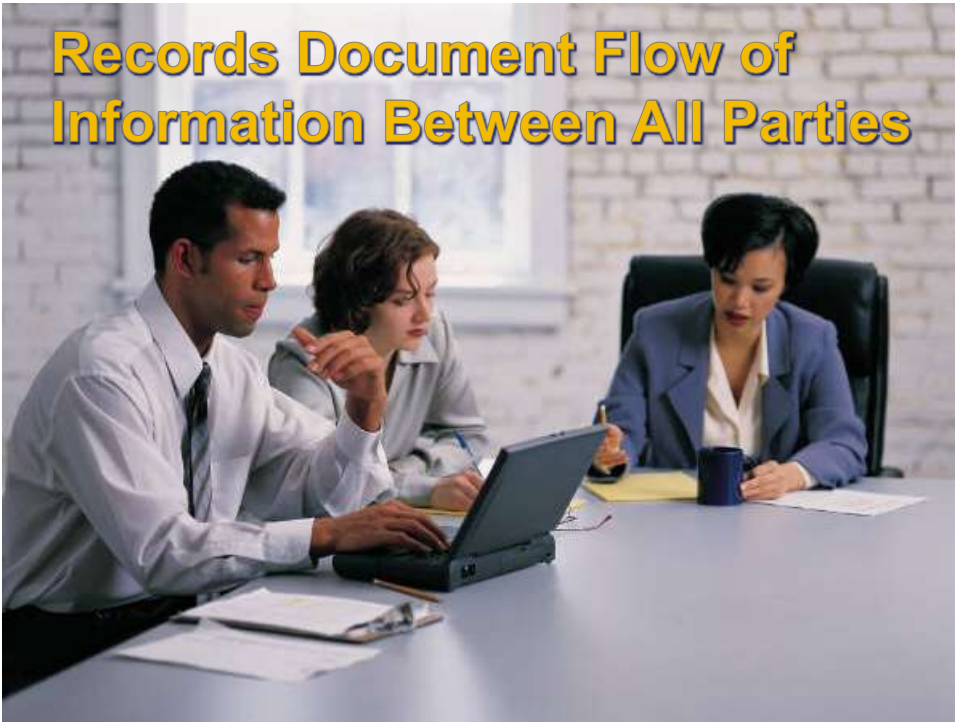
Records Document The Processes & Stages of The Project



**Records
Document The
Decisions By
The Project
Manager &
Team**



Records Document Flow of Information Between All Parties



Regulatory Compliance & Minimizing Litigation Risks Will Be Ensured



Managing Project Artifacts As Records Ensures Authenticity



Records Are Maintained In Accordance With Regulatory Retention Requirements



**Holds Management Prevent
Records From Being Destroyed
While Under A Discovery Order
(Prevents Spoliation)**



**Vital Project Information is
Safeguarded & Will Support
Audits And Lessons Learned**





**Project Records Are
Searchable And Readily
Accessible**



**Will Project Managers Be Able
To Add Records Management
Skills To Their Expertise?**





Compliance Demands & Recent Events Highlight The Importance of Records Management For Projects

Follow These Steps To Add Effective Records Management For Better Projects

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Understand The Business Reasons For Records Management & Communicate This Value To Your Project Sponsor



Feedback

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