The Transformative Impact of Records

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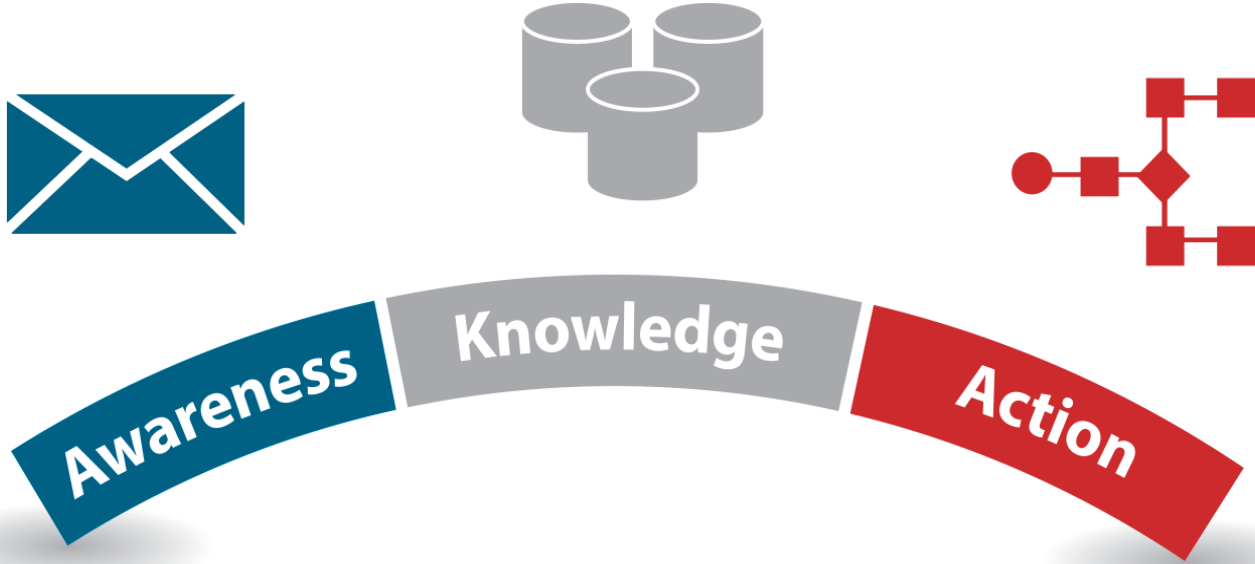
What is Going on Out There?

- People are still defining their initiatives based on the buckets technology companies have created:
    - [Insert Point Solution Name Here]
    - CRM, BPM, Document Management, Content Management, Portal, Sharepoint, etc.
    - Every need is a "Project" (e.g., Reporting!)

- Initiatives Rephrased
    - "I can't find a _____ thing. Help. Please."
    - "It will take me three weeks to find the data, collate it, and come to a conclusion"
    - "I have to go to five different places to get 15 pieces of information"
    - "It would take a supernatural act for me to produce the report that I really need."
    - "We have site. It's a dumping ground. I need to know how things got there."

Popular "Initiatives"
- Actionable KM
- Mobility
- Compliance
- Onboarding
- Actionable Reporting
- Unification

Reality at Work

Getting Started – Nouns & Verbs

- Lots of Record Examples across all Organizations
  - Customers
  - Employees
  - Products
  - Physical Assets
  - Vendors
  - Cases
- Records are both a practical and mental model around how people approach tasks, reports, collaboration…….
- IT'S WORK! (DATA + PROCESS = WORK)