

Stop the DIET Cycle and Boil the Ocean!!

A FUN ANALOGY TO DISCUSS LESSONS LEARNT AND
STRATEGIES FOR SUCCESSFUL RIIM IMPLEMENTATIONS



Speaker Introduction for Context

- ▶ Gabrielle Spurlin (RIIM SME & hobby farmer)
- ▶ Education:
 - ▶ Business Administration/Accounting
- ▶ Primary Industry Experience:
 - ▶ Engineering, Design, & Construction (>25 yrs, Fortune 100 Companies)
- ▶ Notable Roles:
 - ▶ Global RIM Director (>30k employees, 11k – 15k active projects)
 - ▶ University of Florida Professor, Project Management Fundamentals



Objective for today

- ▶ Less “slide show” more discussion
- ▶ Share Lessons Learnt & Proven Strategies for Success
 - ▶ Establishing a RIIIM Organizational Footprint
 - ▶ Implementing RIIIM Governance & Systems
- ▶ Hopefully share a few laughs



My “RIIM” Adventures (the infinite ponder)

- ▶ It all began with a phone call in 2012
(on a dark and stormy night...)
- ▶ “7 experts have tried and failed...want the role??”
- ▶ The quest to understand the challenge began



Fact or Fiction... The “help” started rolling in

- ▶ Experts “failed” ... “Made it too complicated”
- ▶ “The tools don’t work”
- ▶ “Back in the day, we could *always* find documents”
- ▶ “Ridiculous to put so much focus on security...”
- ▶ “We just need a standard folder structure like we use to have”
- ▶ “Stop wasting time talking about process... the tool defines process”

“You just need a good elevator speech”



“Helpful” Elevator Speech Feedback

- ▶ Avoid “data” or “information” – IT topics
- ▶ “Governance” is too directive—kills innovation
- ▶ “ECM” is confusing... what’s “content”
- ▶ “Holistic” is too broad a concept
- ▶ Bad taste for “DRM” from last initiative
- ▶ Don’t need the “R”, just DM – Documents are Records



AI's Elevator Speech

- ▶ AI's response to "Write an elevator speech on the benefits of holistic records and information governance"

Imagine a world where your organization's information is not only **secure and compliant** but also seamlessly accessible and efficiently managed. Implementing a **holistic records and information governance** strategy can make this a reality. This approach ensures that **all data**, from creation to disposal, is systematically **controlled and protected**. The benefits are manifold...

In essence, holistic records and information governance is the backbone of a secure, efficient, and compliant organization, driving both operational excellence and strategic advantage.





Why have there been so many “Branding” efforts

ALPHABET SOUP



Digital Information Enterprise Transformation- “DIET” Analogy

- ▶ Everyone wants a quick solution
- ▶ Most agree change is needed, but the effort is daunting
- ▶ Few are willing to make a true commitment
- ▶ Most start a new solution with failure in mind
- ▶ Old behaviors are easier
- ▶ Market jumps on the next new solution – THIS one works!
- ▶ Who endorses the solution matters



Lessons Learnt





What you call it matters (to most)

THERE'S A COST FOR EXCESS BAGGAGE





History matters...and often repeats

UNDERSTAND WHAT GOT US HERE





Share “findings” cautiously

KEEP FOOT OUT OF MOUTH





Avoid *perceived* power conflicts

“EXPLAINING” VS. BEING “ARGUMENTATIVE”





Communication Styles Matter

KNOW ONESELF & MASTER THE SOCRATIC METHOD





**Never assume an assigned title
equates to Subject Matter Expertise**

TRUST BUT VERIFY





Traditional Stakeholder Mapping is not enough

WHO ARE THE INFLUENCERS / TRUSTED ADVISORS

WHAT ARE THEIR OBJECTIVES / WHAT DEFINES SUCCESS





**Never assume expertise is
prioritized over relationships**

“FACTS” BASED ON AGENDA-BASED OPINION



Strategies for Success!!





Understand the psychology behind the challenge

HUMANS ARE STILL INVOLVED





Think in terms of Ecosystems not Silos

PEOPLE, PROCESSES, AND SYSTEMS

DATA, INFORMATION, DOCUMENTS, & RECORDS





Leverage “resume builders” and “1st to market” trophy seekers

TURN FRUSTRATION INTO A POWERFUL TEAM





Create career path “pull”

LEVERAGE THE BUSINESS TO DRIVE THE NEED





Strike while AI is a hot topic!!

DATA GOVERNANCE IS BACK ON THE TABLE



Back in the day...

- ✓ Must address both Needs & Requirements
- ✓ Often conflicting objectives/CSF's
- ✓ Ecosystem based governance model delivers success

Corporate
Legal
Regulatory
Contractual



Requirements
(Lock the doors)



Needs
(Open the windows)



Easy
Efficient
Flexible

...meets Modern Employee



THANK YOU!

