



Enterprise Records Management with SharePoint: Best Practices

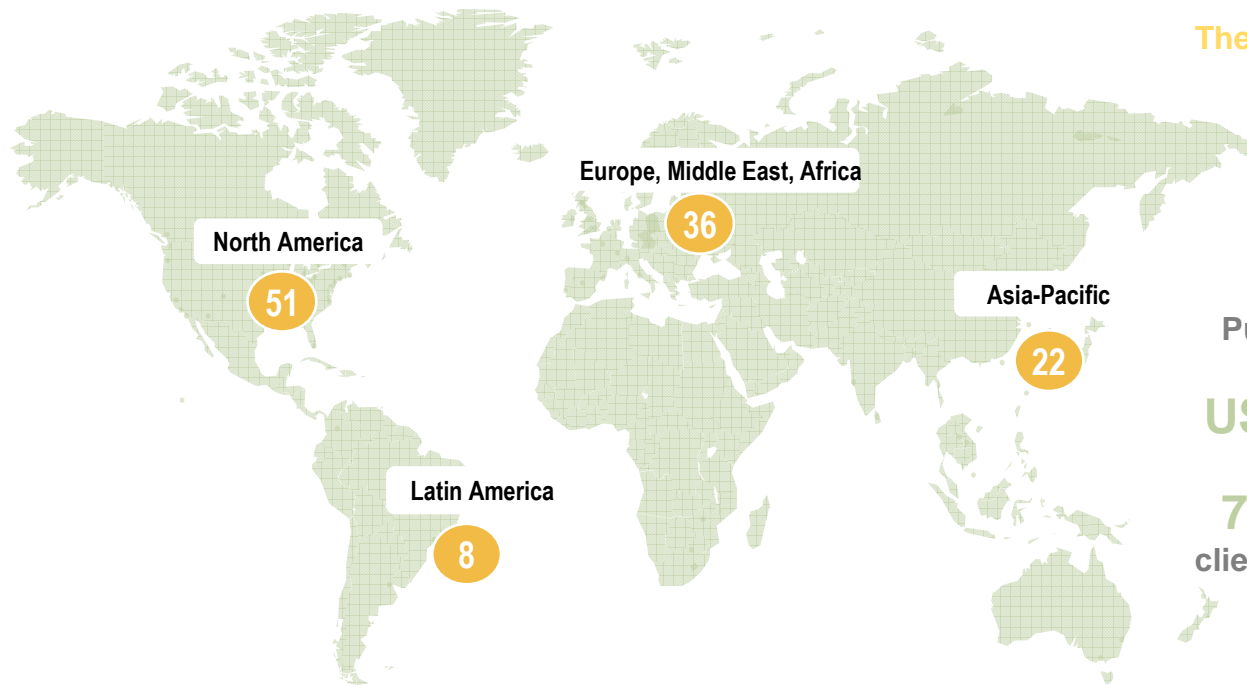
Towers Watson (formerly Watson Wyatt) Case Study

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What you'll hear

- Background
- Steps to a successful deployment
 - Lessons we learned along the way
- Where we are headed



The **strongest** global network of consultants in our business with **14,000** associates in **34** countries and **117** cities worldwide.

Publicly traded (NYSE, NASDAQ: TW)

US\$3+B revenue

75% of the FORTUNE 500 are clients

- With 14,000 associates around the world, Towers Watson is the leading global professional services company.
- Towers Watson offers solutions in the areas of employee benefits, talent and reward, and risk and capital management.

Background



Step 1: Plan your project

- Establish budget
 - Inventory equipment and current technology – upgrade/replace
 - Will paper files need to be migrated to electronic form?
 - Identify resources – IT, legal, business, other
- Identify your customer
- Establish realistic timeline with achievable completion date
- Manage the “change” – get people involved

Step 2 – Build your business case

Mitigate risk	Add value to the business
Provide central repository for unmanaged content and records	Increases global collaboration among practices
Automatically apply retention period	Enables business process driven records tagging
Provides easier compliance with laws and regulation and helps mitigate litigation risks	Improves work product through workflows and version control
Eliminate non-compliant or out of date information	Reduces paper processes and their associated expenses
Reduce time/cost associated with discovery	Support business driven taxonomies

Step 3 – Gain leadership support

- Ensure you have support at the very top
- Identify a project sponsor
- Find business champions throughout the organization

Step 4 – Design your system

- Ask
- Listen
- Design
- Ask again
- Ask again

Step 5: Deployment

- Identify how the system will be rolled out
- Set proper expectations
 - Aggressive timelines can lead to disaster
 - Remember – your timeline is not necessarily the business' timeline

Records Excellence success factors

- Made “change management” a priority
- Secured buy-in from senior leadership
- Started with out-of-the-box technology
- Focused on business taxonomy vs. records management taxonomy
- Implemented a crawl-walk-run deployment model

Using SharePoint

- Content and Records Management (RecordsExcellence)
- Collaboration Team Sites
- SharePoint Online
- Vantage – new Towers Watson Intranet

Where RecordsExcellence is headed - SharePoint 2010

Records Management	Usability	Metadata Architecture
Record declaration using Office ribbon	Content routing using content organizer	Centrally managed practice/line-of-business taxonomy
Centrally managed retention policies for records and non records	Office ribbon interface	Delegation of taxonomy to practice administrators
Litigation hold on records and non-records	Metadata based navigation within document libraries	Consistency of metadata by utilizing keywords

Summary

- Planning
- Funding
- Resources
- OUI
- BEER
 - Be Excited, Enthusiastic, Realistic

THANK YOU
FOR YOUR TIME AND ATTENTION!

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