Identifying and addressing change management issues are critical to the implementation process. It will initially fall to the Business Owner, Steering Committee and Project Team in consultation with the nominated representatives of each participating unit (key business users) to drive this process and engage the user community.

Staff familiar with the existing EDM iteration will not find the transition as challenging as those who are only familiar with the network environment as EDM essentially brings the information management concepts of the physical world into the electronic sphere. Adapting to a more structured framework will take some adjustment.

The amount of time and support required during the transition process will depend on the degree of change required but will go well beyond the initial rollout period.

The greater the depth of change to be achieved, the more time and investment will be required to alter the working environment.

**SHALLOW** Fine Tuning

Restructuring

Re-allocation of resources

Improve business planning

Change definition of success

Strategic interventions (change culture, values)

**DEEP** Paradigm changes

The focus of the change management activities will be to identify and minimise all the technical and operational barriers so that resources can be directed to “people and the way that they work” issues.

Particular attention will need to be made to address specific aspects EDM functionality which will not be familiar and tend to be the most challenging for users to incorporate into practice ie:

* lifecycle and status - draft, revision, reversion, final.
* security and access attributions.

The following table outlines the key change management matters.

|  |  |
| --- | --- |
|  | Change Management Issues |
| 1. | Ongoing consultation is required between all the stakeholders in relation to fundamental aspects of the EDM implementation including responsibilities, roles and budget. |
| 2. | Reviewing /developing the overarching EDM policy, procedures and business rules. |
| 3. | Qualifying specific operational matters such as document and file naming conventions. |
| 4. | Scoping, formatting and verifying the integrity of any migrated data. |
| 5. | Preparing the infrastructure for the deployment including integration into the standard operating environment (SOE) including service level requirements. |
| 6. | Configuring the foundation EDM environment. |
| 7. | Consultation between Technical and Operational representatives to ensure that the EDM is smoothly integrated into the production environment. |
| 8. | Establishing ongoing support and development arrangements with the application provider or other parties as appropriate. |
| 9. | Developing a communications plan, training arrangements and detailed implementation checklists to reflect the particular context and requirements of each participating Business Unit. |