

When planning an information management strategy, there can be an overwhelming volume of documents and other content to address.

Within even a single business unit of a typical organisation, thousands of documents are created in a given year. While it would be desirable to have all of these managed to the same high level, this is clearly impractical.

In practice, however, there are certain types of documents that need to be managed more tightly, while others can be ignored (at least in the short term).

This briefing identifies some key categories of documents that should be targeted as part of information management projects, and discusses a number of practical approaches that can be taken.

Identifying key information

While thousands of documents are created within an organisation, many of these do not warrant close attention as part of an information management (or document management) project.

Instead, our experience in organisations has shown that there are three main categories of key information within many organisations:

- Key corporate information
- Information shared within an organisation
- Information communicated externally

This is not an exhaustive list, but it does provide a starting point for identifying which information should be managed more rigorously within an organisation.

Key corporate information

There is some information that is clearly important within an organisation, such as corporate policies, strategic plans and annual reports. Key corporate information may also include reports generated to meet regulatory or legislated requirements.

This information is generally well-recognised, and is often already the focus of document and records management projects. That being said, there are many situations where even this important information is poorly managed.

Information shared within an organisation

In many cases, this is the most important information to manage. Where documents are used by multiple teams or business units, they must be stored and communicated in a way that is recognised and understood by all groups.

For example, multiple teams may be involved in delivering a large project. This requires a clear file structure, and a consistent naming of key documents.

Information communicated externally

It is often very important to closely track information that is communicated to external stakeholders, or to the public as a whole. This ensures consistency of communications, as well as mitigating the risks of disseminating incorrect information.

There are often serious consequences to having multiple areas of the organisation sending out inconsistent information, or having some areas of the business not knowing what others have sent out.

Ignoring some documents

Beyond the documents in the categories above, there is much information within an organisation that can (and should) be ignored by information management projects.

For example, project teams typically create a huge number of documents across the lifetime of a project. Most of these documents are used solely by the project team, with only a few key documents shared with a wider audience.

In this situation, efforts should be focused on those documents that are shared or reused, with the others left to the project team to organise as they see fit.

Targeting efforts

In practice, information management initiatives should target their efforts first on the key documents. Better managing this information will have the greatest impact on the organisation, recognising that only a limited amount of change management is possible in a given timeframe.