

Information Management Case Study

Challenge:

A firm of architects; organisational structure was hierarchical comprising directors, associates and approximately 150 employees. There were inadequacies in retention, storage and retrieval of information relating to client projects.

Information was not valued as an asset in its own right and there was no recognition of the importance of information as a key component of wider organisational strategy and contribution to achieving business objectives.

One of the key organisational strategies revolved around the acquisition of new clients (new revenue streams) and this was done primarily through the submission of proposals and tenders for new projects.

Previous attempts to manage (client) project information had been unsuccessful. Three databases had been created to house the information but each one had been used for a period of time and then abandoned. Each time there was no attempt to integrate the old database with the new. The lack of an IM policy meant that there was no strategy for easy and accessible retrieval of this important information base.

The directors (finally) began to recognise that access to and knowledge of previous (similar) proposals and tenders could reduce the time taken to prepare new proposals and tenders. Learning from previous ones in terms of which were successful and which not, could not only save time but would also save costs. Time could be freed up and better spent working on projects i.e. on fee earning activities.

Solutions adopted:

An information audit was proposed. The audit's main purpose was to improve the processes of finding, storing and retrieving project information and related documents including computer aided design (CAD) image designs.

The person responsible for practice information undertook preparation for the audit.

The key questions asked by the audit:

- What are the Firm's key business objectives?
- What information does the Firm need (for proposals and tenders)?
- What information does it currently have?
- Where do employees access this information?
- What do they do with the information?
- Who has access to the information?
- How is the information managed?

Associates and employees responsible for putting together the proposals and tenders were asked to model the ideal situation – what information (about previous client projects) would they expect to be able to retrieve?

The role of the information professional was to lead the audit, put together a small internal team to assist, evaluate the findings and report back to the directors.

Outcomes:

Gaps in the availability of project information were identified – the solution was to create a database of project information (including past projects) and this was made available on the firm wide intranet (accessible by all).

Ownership and management of the CAD images was established and agreed. These images played a very important part in the tendering process and could be reused again and again.

Associates (project leaders) were made responsible for ensuring that their teams routinely updated the database as projects were completed.

The initiative led to reduced time being spent on preparing proposals and tenders and more time being spent actually working on client projects and innovation.

The value of the IM initiative was measured by the review of time sheets, which indicated clearly that the Firm's employees were spending more time working on client projects and increasing fee-earning activities thus making a positive contribution to the bottom line.

Six months later a smaller audit was undertaken to check that the database of information was being populated as required (it was).

All in all a positive outcome.

Reflections:

Having a structure like the information audit enabled the Firm to approach the issue in a logical way, using tried and tested frameworks.

Having a qualified informational professional in charge of practice information allowed her to put into practice theories learned whilst studying at Masters level. It gave her the confidence to approach the directors with her proposal for an audit. She was also able to show how important the management of information was in helping the Firm achieve its business goals.