Why a collaborative mindset is integral to information management

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Better governance = Better business

Traditionally, critical business information like emails and documents were saved in disparate locations across desktops, and inside email inboxes, or printed on paper to create physical files. The emergence of Office 365 has not significantly addressed this problem, with emails stored in Exchange, documents in SharePoint, and conversations in Teams.

## What we talk about when we talk about compliance and governance

> Governance is a broad term. It means more than simply records management. It is also about being able to find the right information across your business at the time it's needed.

The introduction and subsequent growth of Microsoft Teams as a collaboration tool has added yet another potential information silo. This spread of documents, emails, and now Teams conversations has exacerbated this problem, making the right information sometimes impossible to find.

Office 365's collaborative tools may empower employees to work more efficiently, but they do not have comprehensive information governance built in.

The way you store important business documents has a direct effect on the way you execute your business processes and your ability to provide effective services for your customers. Information governance and compliance is not only important from a records management perspective, it's essential to the day to day running of your organization.

Governance must be a proactive and natural part of your workflows. When considered an afterthought, it's likely that your information governance and records management will suffer. Not only is it difficult for employees to go back and correctly categorize and classify various forms of information, many have no interest in doing so. Workers tend to see those tasks outside their job remit which means they aren't motivated to complete the task.
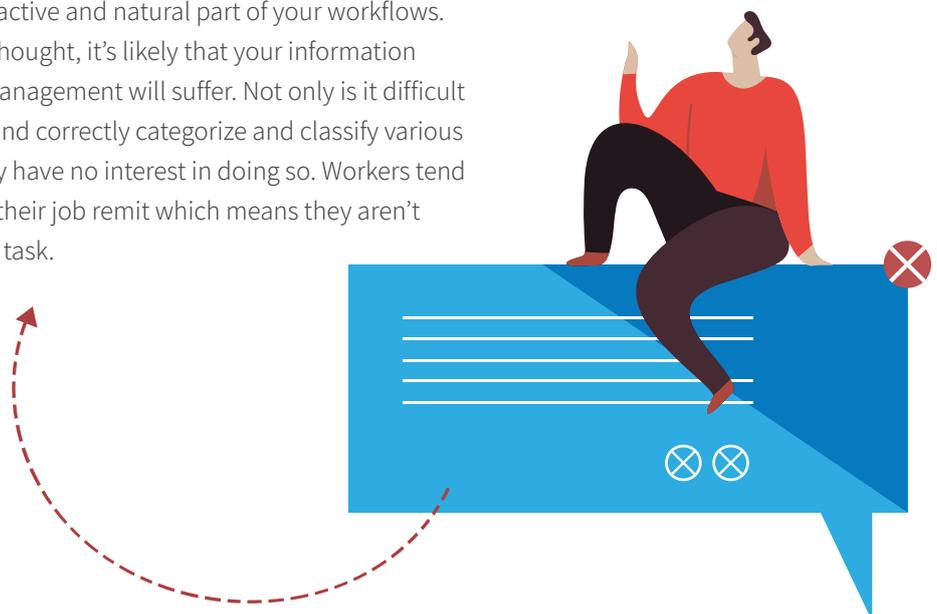
This eBook will explain why compliance plays an integral role in your information governance and the problems that arise from employees struggling to find the right information. We'll look at two business case examples that highlight how these issues can affect your business. Then, we'll show you how you can establish a collaboration-mindset to enhance your governance practices and achieve your business goals.

Problems with poor information management

The volume of information being generated within businesses is accelerating at an unprecedented pace. Information is the lifeblood of any organization, no matter the size, which means they must address where that information lives and how easily it can be found.

If workers struggle to find the information they need, whether it's documents in SharePoint, emails in Outlook, or conversations in Teams, your organization will suffer.

Stunted productivity

Independent research firm Vanson Bourne interviewed 1,500 office workers employed at organizations spread across the globe[1]. 82% of the respondents said that poor information management hurt their productivity, blaming the different systems and locations they needed to navigate through to find what they needed. In addition to this, nine out of ten people said that their jobs would be made easier if they could quickly access the most current version of a document, without having to worry about the system or repository in which it resides.

> When information isn't captured and classified correctly, employees waste a serious amount of time searching for the documents they need to efficiently do their job.

Multiple stakeholders

Many organizations hold multiple offices in multiple places: this makes having an intelligent and simple governance strategy set out from the very beginning more important than ever. Many people can work on projects at any given moment – case managers, colleagues responsible for inputting data, clients and their employees, and third parties. Many of these people may be collaborating or speaking across multiple platforms and you need to ensure they're working off the same page, so to speak. When one person out of the team fails to capture and classify information correctly, that information then stops being available to your business.

1. Small Biz Trends. (2019). 82% of Your Employees Believe Poor Information Management Hurts Their Productivity. Retrieved from: https://bit.ly/2RsOZpB

The case for proper governance
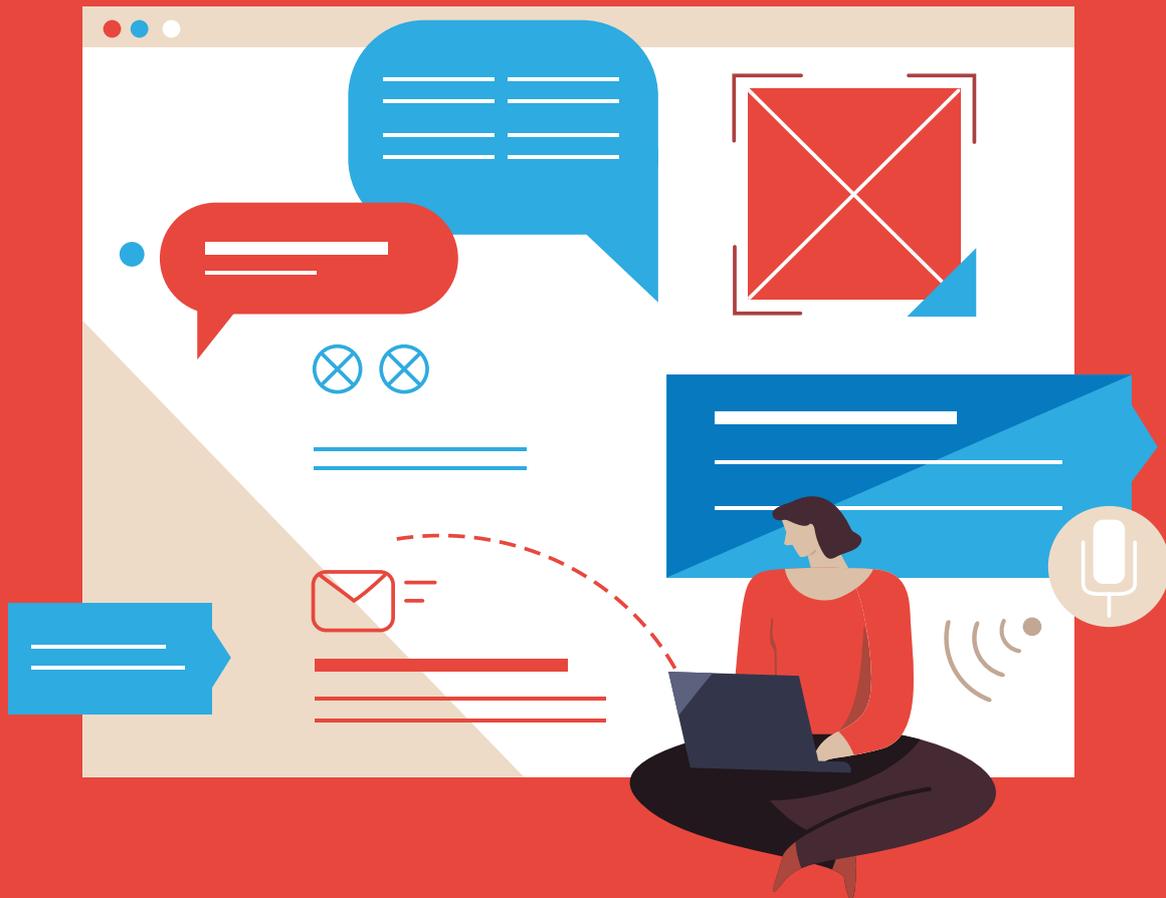
There is a distinct lack of connection between the two predominant communication apps that Microsoft offers – Teams and Outlook. Employees tend to use Teams for internal communications, although sometimes cross-company channels are created, and Outlook is used for external business communication. The chasm between the two platforms has constructed a barrier to successful governance. There is more information, spread across more platforms, to organize and categorize. Which isn't easy without proper information management.

Let's look into two specific case studies that highlight the potential difficulty that organizations struggle with when governance isn't built into their essential collaborative processes.

Account management

Let's play out a hypothetical scenario. You work as an account manager responsible for handling a client firm's taxes. The client has regular questions about tax implications of certain business actions they take as part of their business. As the account manager, you are the focal point of engagement and speak directly with them through email. If the communication process ended there, then governance would be nice and easy, but that's not the case.

The email received from the client triggers an internal process that could demand collaboration from many departments within your business. You open up Teams, find the right channel, and send a message asking multiple workers to complete their role in the process. This could spark numerous conversations on many channels, with important information being sent back and forth from disparate locations. Documents will be worked on and saved – hopefully – in the right place with – hopefully – the correct version attached so that the next person picks up the most up-to-date information.

You proceed to develop your opinion based on all the data made available to you before sending it over via email. The problem is that it takes just one team member to render the effort obsolete by forgetting to properly capture and classify emails, documents, and any other pertinent information.

Case management

Another scenario. You work for the local government when a journalist emails your department with a freedom of information request for a story. She plans to publish next week, and the clock is ticking. Your colleague who handles these matters started leave last week and cannot be contacted, which means the task of replying with the accurate information, in a short period of time, lands on your desk.

You open up the case management tool, which could be a spreadsheet, folder or CRM system, and quickly realize the information you need is missing. When you either fail to respond with the information or send back an inadequate answer, your organization is in breach of the Freedom of Information Act, which comes with consequences.

The art of effective case management requires a comprehensive overview and complete access to every piece of case information. You must be able to find that information – whether it's legal proceedings, health data, social work, or fundraising figures – to intelligently analyze it and make sound decisions. Your case management tool may capture the essentials of the case, but much of the case-related information will be held elsewhere – in emails, in SharePoint, and Teams, for example.

A skilled case manager with a good handle on the case can count on themselves to save information in the right place. But the case is likely a collaborative effort that requires other people to work on documents and emails, which means they would have to trust their competency. Which is not an adequate strategy. Case managers rely on effective tools to complete their job.

When you implement the right case management tool and strategy that brings the information to you, you stop wasting time and leave workers more time to focus on the case itself.
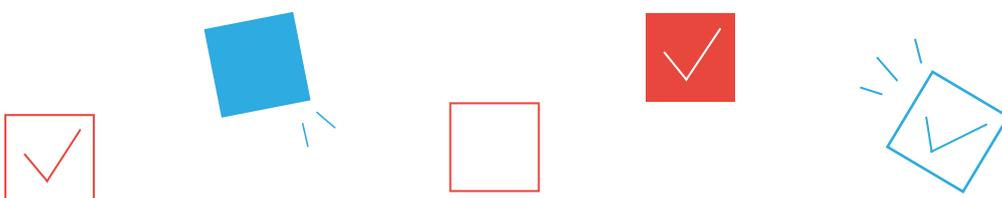
Establish a collaborative mindset into compliance and governance

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Introducing the practice of capturing and classifying information early into work processes will help ensure you can effectively manage information. You can empower your employees with the responsibility to maintain governance by making it a natural part of your collaborative processes.

It's difficult for employees to go back, after the fact, and apply the correct classification to emails and documents. This is why incorporating governance into business processes from the very beginning ensures everybody plays their role in the collaborative effort to manage information properly.

Benefits of better compliance

— Empowers employees and encourages collaboration by bringing the conversation to a single place – while enabling them all to play their part in the conversation.

— Improves consistency and speed when classifying information when looking for it in the future.

— Boosts customer relationships and confidence when you know where to find the most up to date and accurate information quickly.

— Storing information in the right place with the correct classification ensures people can easily find what they need in the future and gives you one single source of truth.

— Improves trust between employees and departments with accurate and up to date information.
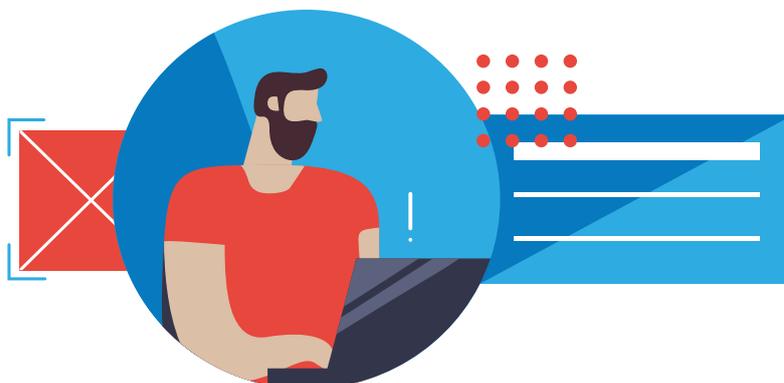
# harmon.ie – make the right thing the easy thing
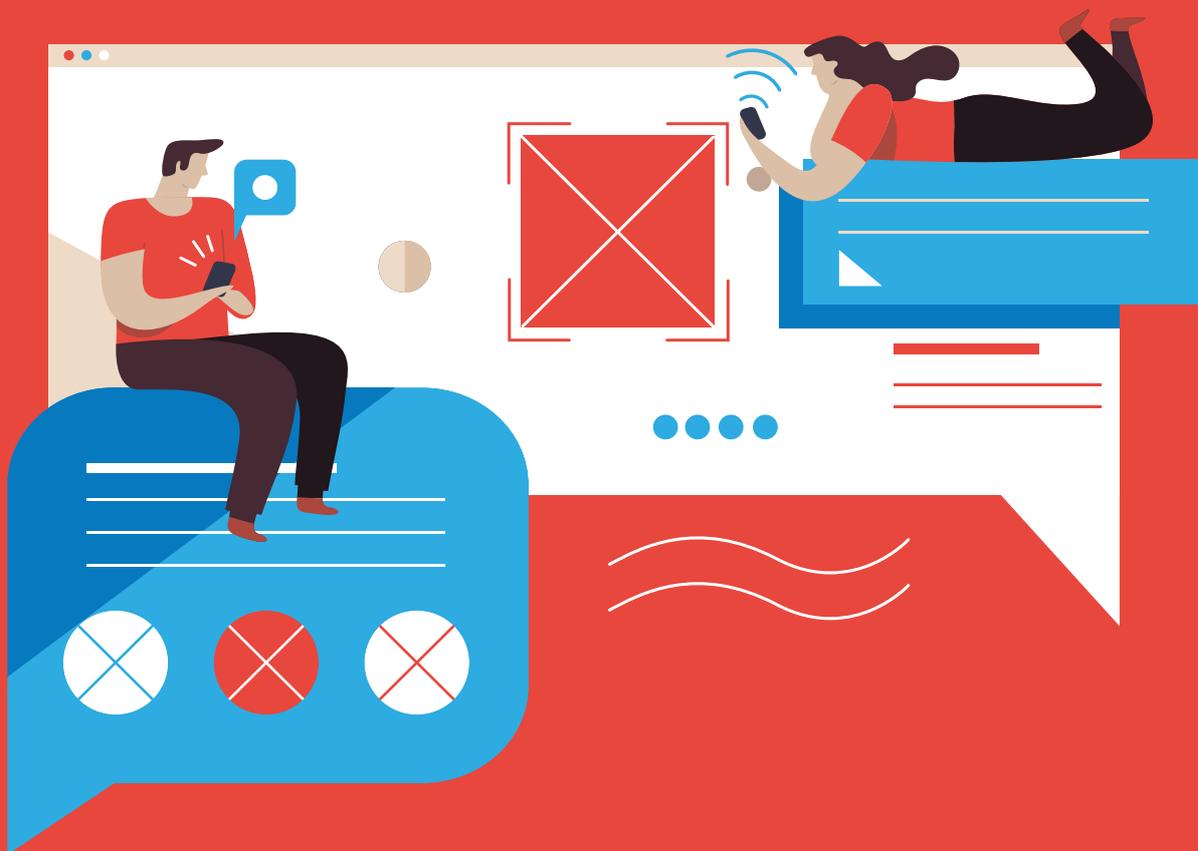
harmon.ie helps you achieve much simpler and more effective in-place email and document management. We understand that governance must be viewed as a natural part of the collaborative efforts of every single employee. With that in mind, we developed our tool so that governance is integrated into collaborative workflows from the very beginning. This makes it a natural and proactive step in employees' everyday working lives – helping to enhance collaboration by ensuring information is captured and classified correctly, making it easy to find in the future.

You no longer have to save emails into SharePoint so you can find them later: our in-place email and document management tool now streamlines the process to give users more control. Our latest technology allows you to bring together all your data across SharePoint, Teams, and Outlook – giving you fast and efficient access to all your information from a single pane of glass.

Capture, collaborate, and comply

harmon.ie harnesses the power of SharePoint metadata and enables you to classify your information on a granular level with far greater ease. You'll be able to drag and drop information straight from Outlook into a Teams channel, which links to a corresponding SharePoint location. All team members receive an alert that notifies them of this action, ensuring everybody stays up to date and has a complete overview of all information at all times.

Your organization cannot approach collaboration and governance as two separate entities. When your information is organized correctly, you give your workers the ability to work effectively and productively. When you embed this operation into the daily collaboration process, you make the right thing, the easy thing to do.
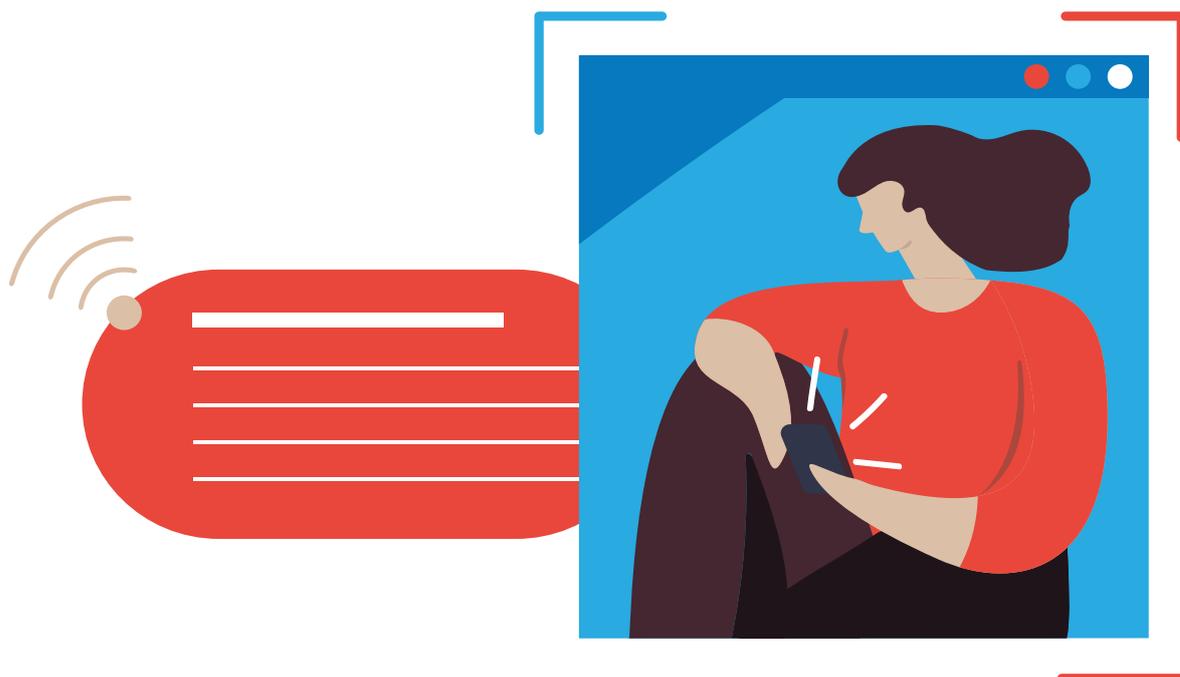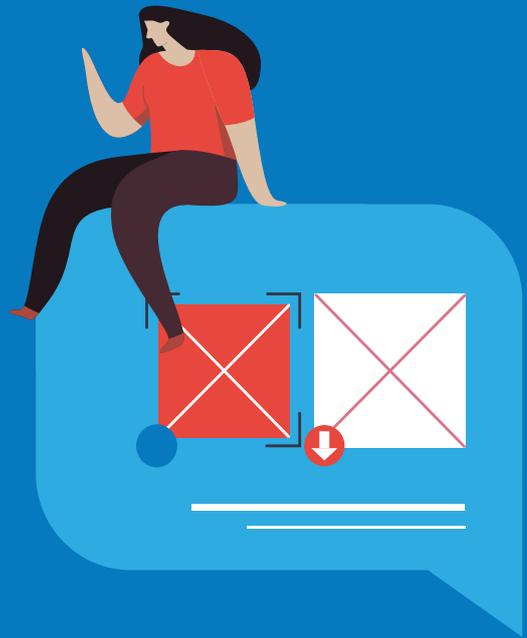
To learn more about how harmon.ie can turn governance into a collaborative, team effort, get in contact with us today.

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Find out more about why the best tech solutions for your employees should be the easiest ones to use. Visit our website to view additional resources or to speak to a harmon.ie collaboration expert.