

Strategic IM Planning

Policy and Procedure Development

Classification, Taxonomy and Metadata

IM Software Evaluation and Selection

Change Management

Training and Communication

Information Retention and Disposition

**CONDAR**  
CONSULTING INC. 

# Building Blocks of Successful Information Management

Having access to the right information at the right time makes all the difference when it comes to improving productivity, reducing costs and mitigating legal and other risks.

Successful information management (IM) depends on addressing the complete life cycle of your information and records, from creation to deletion. Your success also depends on ensuring that the processes, tools, training, technology and management elements of an IM program are all in place and working together effectively.

CONDAR Consulting Inc. provides product- and technology-independent advisory services encompassing all aspects of a successful IM program. CONDAR has helped hundreds of organizations to achieve results in cost reduction, productivity and risk management throughout all stages of the information life cycle.

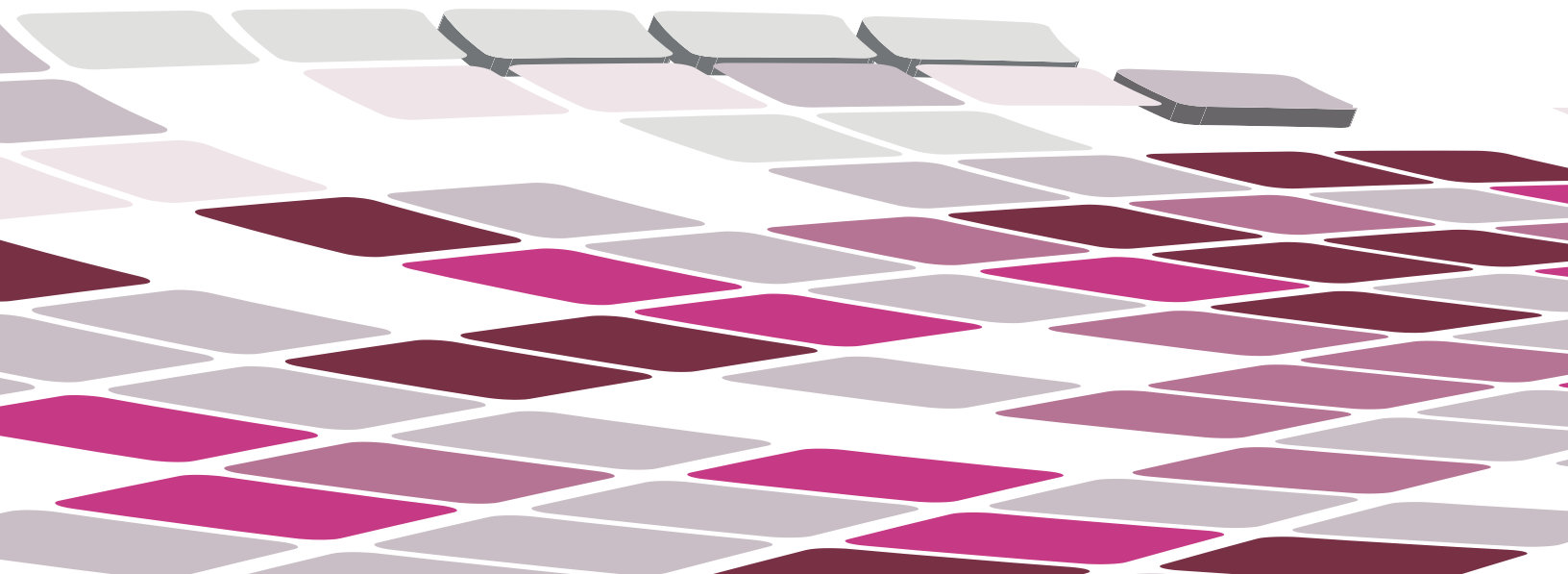
## Strategic IM Planning

Your IM strategy is your blueprint for improving the management of recorded information. It combines industry best practices, current technology and your own organizational requirements into a plan which is suited to your unique environment and objectives.

CONDAR has a proven track record in helping organizations define the strategic direction of their IM programs. We can identify your organization's strengths and weaknesses, assess threats and opportunities, analyze and benchmark existing practices, and develop a comprehensive plan for information management. We will ensure that your IM strategy meets organizational objectives, satisfies prevailing legislated and/or regulatory requirements, and equips your organization to better manage information in the short, medium and longer terms.

We also recommend measurable, relevant metrics for assessing IM strategy performance. And to help you secure support for IM strategy implementation, we can determine – and build the business case for – present and future resource needs for staffing, funding, space, equipment and technology.

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## IM Software

CONDAR takes a pragmatic approach to the implementation of IM technology in the workplace. If advanced IM software is the best solution for your organization, we will tell you that. However, if you can improve productivity and solve operational problems with simple procedural changes or a more disciplined approach to managing information, we will tell you that first.

Because CONDAR is not affiliated with any vendors or distributors, we provide completely independent expert advice when it comes to evaluating or implementing new IM software. We have unbiased views of the strengths and weaknesses of all major EDRMS/ECM systems on the market today, including SharePoint, Livelink, EMC Documentum, etc.

For organizations planning to implement IM software, our team can identify users' needs, develop functional requirements, design a competitive bid process, participate in evaluation and selection as a trusted advisor, and assist in planning for implementation.

## IM Business Tools

Firmly establishing an IM strategy includes the need to add, redesign or update a specific set of business tools: the policies, procedures and business rules that reflect your organization's IM practices. Policies, procedures and business rules create the operational framework for implementation by defining accountabilities and providing for compliance management.

CONDAR can design and implement a complete range of policies, procedures and business rules to support your IM strategy execution. These tools are designed to meet high standards for operational needs, legal compliance and industry best practices.

Here are some examples of the types of business tools CONDAR has developed for past clients:

- Information classification systems
- Metadata schema
- Information retention and disposition schedules
- IM, e-mail management and legal hold policies
- Procedures for information life cycle management
- Vital records identification and protection protocols

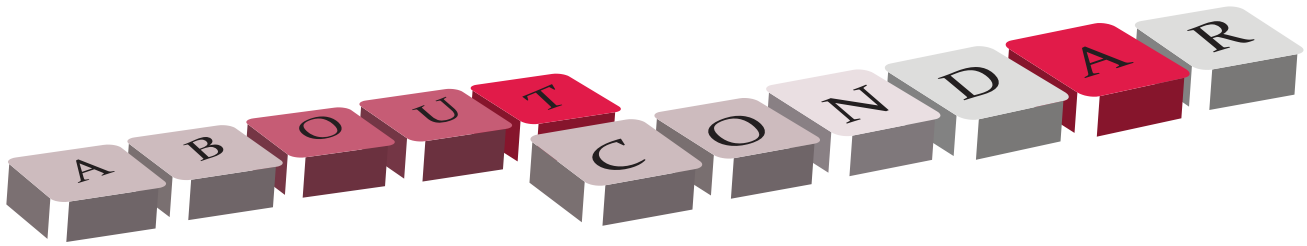
## Change Management

In the end, information management is more than strategy, technology or business tools. Successful information management takes the people within the organization into account as both the implementers and users of IM programs, and no matter how well conceived and planned, all IM programs succeed or fail according to how well the human factor is managed.

CONDAR can help you design a change management plan to deal with this "human" side of change. We can help you develop and implement an ongoing communication program to emphasize IM strategy benefits, engage and maintain senior management support, and cultivate employee compliance and momentum.

We can also help you to identify training and support needs. CONDAR will develop and deliver training for both IM staff and users to ensure they are equipped to fulfill their responsibilities, gain maximum value from new technologies, procedures and other IM business tools, increase compliance and reduce frustration. We will also offer recommendations for ongoing user support and incremental communication and training.

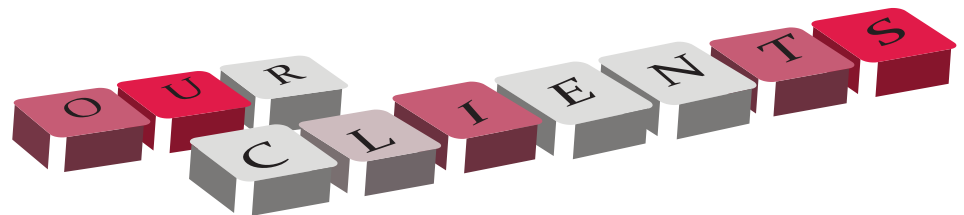
**Closing the gaps in your  
Corporate Memory<sup>®</sup>**



Established in 1991, CONDAR Consulting Inc. is a product-independent information management consulting firm.

We have successfully completed hundreds of engagements with over 150 corporate, government and not-for-profit clients across Canada, the USA, and overseas.

Our team of specialists is dedicated to providing practical solutions to today's information management challenges.



## Representative Client List (by industry sector)

### CORPORATE

Business Development Bank of Canada  
Canadian Broadcasting Corporation  
CAAT Pension Plan  
Enbridge Gas Storage  
Great Lakes Power Transmission LP  
Humber College, Planning and Development  
Hydro Ottawa  
Inter-American Investment Corporation  
Kinder Morgan  
Minto Development  
OMERS  
Pfizer Consumer Healthcare Canada  
Toronto Community Housing Corporation  
Vale (formerly Inco Ltd.)  
Waterloo North Hydro

### GOVERNMENT

Auditor General of Canada  
Bank of Canada  
Government of Yukon  
Health Canada  
House of Commons  
Legislative Assembly of Alberta  
Library and Archives Canada  
New Brunswick Securities Commission  
Peel Regional Police  
Privy Council Office  
Region of Halton  
Region of Peel  
Region of York  
Senate of Canada  
Service New Brunswick  
Supreme Court of Canada

### NOT-FOR-PROFIT

Canadian Dental Association  
Canadian Institute for Health Information  
Canadian Labour Congress  
Canadian Payments Association  
Canadian Standards Association Group  
College of Medical Laboratory Technologists of Ontario  
College of Physicians and Surgeons of Ontario  
College of Psychologists of Ontario  
Elementary Teachers' Federation of Ontario  
Ontario Association of Community Care Access Centres  
Ontario Hospital Association  
Ontario Medical Association  
Royal College of Physicians and Surgeons



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