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Development and implementation of records management policies and procedures in *Cocoa Bean*

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Cocoa Bean

Overview of the organization

Cocoa Bean, a medium size chocolate manufacturing business, was established in 1990. It produces artisan Belgian chocolate products. Apart from maintaining two retail shops, *Cocoa Bean* is growing as a wholesaler supplying its business partners nationwide and abroad. Currently, *Cocoa Bean* employs 40 people. The main departments dealing with electronic and paper records of the company are:

- Sales
- Manufacturing
- Finance
- Logistics
- Human resources

At present*, Cocoa Bean* maintains both electronic and paper records of various business transactions and processed. Although, as the company is expanding, issues relating to records storage, retrieval and access are rapidly increasing.

Therefore, our business case aims to address the arising issues and propose a project that could resolve records management issues by implementing future-proof solutions.

DUBLIN BUSINESS SCHOOL

MSc Information & Library Management

Development and implementation of records management policies and procedures for

Cocoa Bean

BUSINESS CASE

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Executive summary

The purpose of this report is to present a business case for *Cocoa Bean,* a medium size confectionary manufacturing company, for development and implementation of a new records management system.

Our insight into *Cocoa Bean* organizational context and current records management practices, allowed to define key issues that need addressing:

- Records management is not recognized as an integral function of the organization.
- Records management policy is not developed and implemented effectively, i.e. employees are not familiar with good recordkeeping procedures.
- E-mail messages are left indefinitely in email system, thus, making it difficult to find needed correspondence and manage it.
- Constantly growing volume of records is becoming increasingly difficult to effectively manage them.

Therefore, in order to address these issues and minimize risks associated with them, we conducted literature review and, taking into consideration organizational context of Cocoa Bean, developed key recommendations for a new records management system. They include:

- Development of a records management policy.
- Development of a business classification scheme and a new file plan.
- Ensuring records security.
- Implementation of records retention and disposal schedules.
- Drafting an e-mail management policy.
- Organization-wide implementation.
- Phasing the project according to DIRKS (Designing and Implementing Recordkeeping Systems) methodology.
- Focusing on change management in order to ensure user acceptance.
- Proposed time frame - 6.5 months.

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Good recordkeeping is fundamental to good business (The State Records Authority of New South Wales, 2003).

1. Introduction

Records are a vital part of the successful functioning of any type of organization. They serve as evidence of business transactions and, therefore, ensure business transparency and accountability. Moreover, records have direct impact on future planning and decision-making within the organization.

This business case for *Cocoa Bean*, chocolate manufacturing company, is a result of investigation into how organization's record management procedures are effecting its goals, priorities and overall performance. The report will discuss present situation and arising issues within the company regarding its records management. In addition, we will present rationale for implementation of records management policies and procedures. Also, project methodology, benefits, costs and proposed project phases will be presented and discussed.

The following section will detail current situation of records management in *Cocoa Bean*.

2. Current situation

2.1 Business context

Cocoa Bean, a confectionery manufacturing business, combines the best of Irish and Belgian artisan production. In order to sustain competitive advantage achieved over the years, the company is constantly striving to maintain smooth transactions and negotiations with the suppliers nationwide and abroad. Moreover, the growth of the company, i.e. expansion to wholesale area presents great future prospects. Although, these changes emphasize the need of effective records management within the company to ensure smooth day-to-day functioning.

2.2 Records management in *Cocoa Bean*

Cocoa Bean manages its records in both paper and electronic format. The main departments of the company (Sales, Manufacturing, Finance, Logistics, Marketing and Human Resources) store their records in a shared drive and physical file cabinets. Preliminary investigation into current records management procedures *in Cocoa Bean* revealed its main shortcomings.

First of all, records management is not recognized as an integral function of the organization and there is no person with formal responsibility for the management of the organization's records. Instead, senior staff of the departments are responsible for the records they create and manage. As a result, with no standardized method of records creation, naming and storage, records are loosely organized and are becoming increasingly difficult to control and retrieve.

Secondly, although *Cocoa Bean* has a records management- type policy addressing data protection issues and indicating retention periods for financial documents, it is not developed and implemented in a way that would benefit the company, i.e. employees are not familiar with good recordkeeping procedures. As a result, unnecessary duplication, *ad hoc* disposal of non-current records and a backlog of records that are not in use anymore are increasing issues.

Thirdly, as the company conducts a lot of negotiations and communication via e-mail, a bulk of important attachments are stored in e-mail boxes and do not reach shared drive for shared usage. Also, leaving e-mail messages indefinitely in email system, is making it difficult to find needed correspondence and manage it.

In addition, as the company is expanding, the volume of records is constantly growing and, without a robust system in place, is becoming increasingly difficult to effectively manage them.

In order to better understand present situation of *Cocoa Bean*, we can summarize it in a SWOT (Strengths, Weaknesses, Opportunities and Threats) table:

Strengths	Weaknesses
- Well-established business – stable day-to-day procedures. - Achieved competitive advantage. - Not too large organization – easier	- Ad hoc records management practices. - Staff not familiar with records management principles.

to implement new programme and manage change**.**	- Records management policy not developed and implemented enough. - No guidelines for e-mail management.
Opportunities	**Threats**
- Further growth of the company - New markets abroad - Availability of new technologies	- Loss of competitive advantage - Failure to comply with legislation requirements - Loss of records

Table 1. Cocoa Bean SWOT analysis

Overall, the key issues related to records management in *Cocoa Bean* stem from the lack of well-defined records management policy, robust and future-proof filing system and staff awareness of good records management processes and standards.

The identified issues pose serious risks for the business. Therefore, the threats associated with poor records management are explored in the following section.

2.3 Risks associated with current issues

First of all, without fully developed and implemented records management policy, *Cocoa Bean* is exposed to increasingly chaotic records management practices that can result in loss of important records or their untimely destruction. This might result in **reduced business transparency and accountability.**

Secondly, **efficiency of daily tasks is reduced** because without strategic filing structure, it is easy to "misplace" a record in the system, therefore increasing time needed to find it the next time. As a result, increasing disorder and inefficiency in the workplace is a risk that *Cocoa Bean* has to address.

Thirdly, as *Cocoa Bean* has established strong customer relations and trust, poor e-mail management might result in lost or unreachable records that might **negatively affect customer-supplier relations** and, in this way, **damage business reputation**.

In addition, as a medium size business, *Cocoa Bean* stores all its records on-site and does not have a disaster recovery plan in place. This poses a serious **threat of a total shut down in case of a serious incident**.

Also, without strategic records management in Cocoa bean, the risk of **disclosing sensitive information** is posing a serious threat for the business, either by breaching Data Protection laws or disclosing confidential business information to unauthorised personnel. The latter issues is addressed in section 5.3.

Overall, records are considered to be "an indispensable tool in the decision-making process <...>" (Smith, 2007, p. 39). Therefore, in a longer run, without addressing arising issues, *Cocoa Bean* is facing possible **loss of competitive advantage** because irregularities and inefficiencies of recordkeeping might impede general decision making within the company and reduce overall levels.

To sum up, there is a pressing need for organization-wide recognition of the importance of records management standards and procedures. Therefore, this would be the first step towards minimizing risks arising from identified issues.

3. Rationale for records management programme

First of all, records, as "recorded evidence of an activity" are crucial to existence and functioning of any organization (Shepherd and Yeo, 2003, p. 2). For *Cocoa Bean*, a medium size enterprise business, records support internal accountability, decision making, compliance with existing legislation, and measuring performance and success. Therefore, effective records management in Cocoa Bean cannot be underestimated.

Secondly, even though *Cocoa Bean* manages its records in paper and electronic formats, the latter is predominant and, therefore, needs up-to-date regulations and procedures in order to ensure records security and discovery.

Apart from case studies provided by commercial electronic document and records management systems (EDRMS) vendors, records management in SMEs (Small and Medium Size Enterprises) is rather unexplored area. Although, most of academic literature discusses importance of effective records management in public sector, medical institutions and government bodies, we cannot assume that effective records management is not essential for private-sector organizations. *Cocoa Bean* situation and arising issues related to its records complement research findings by Borglund et al. (2009, p.51) that investigated few SMEs in Finland and Sweden and concluded that records in this type of organizations are often managed in ad hoc manner by individuals that have little or no training, the main

reasons for this being lack of appropriate records management strategies and familiarity with records management standards, e.g. ISO 15489. Therefore, it is important for any type of organization to establish effective records management in order to meet legal obligations and ensure efficient daily performance.

4. *Cocoa Bean* options

Considering current issues, *Cocoa Bean* is facing several options that are discussed below.

4.1 Do nothing

Doing nothing is one of the options *Cocoa Bean* can choose in order to save costs of designing and implementation of new records management policies and procedures. Although, the identified issues regarding records management within the organization will not disappear and, in a longer run, are likely to cause some damage associated with the risks discussed in section 2.1. Therefore, we do not consider it as a viable option for Cocoa Bean.

4.2 Full change-over to digital format

The second option for *Cocoa Bean* would be to embrace the idea of going "fully digital" and buy an electronic records management software. Although this might sound like an attractive solution, it is a costly option for the organization of this size. Moreover, even though electronic records are prevailing in *Cocoa Bean* daily transactions, paper format is still widely used and, being only a medium size organization, *Cocoa Bean* does not face imminent need to convert all existing paper records into electronic format.

Therefore, we do not consider buying an electronic records management system as the best option for *Cocoa Bean*.

4.3 Records management programme

The most viable solution for Cocoa Bean would be addressing arising issues at the "root", i.e. implementation of a comprehensive records management programme gradually, including in-depth analysis of business activities and structure, drafting a comprehensive and usable records management policy, designing a strategic file plan, ensuring compliance with related legislation and providing staff training to adapt to change.

We consider this to be the most appropriate way for *Cocoa Bean* to tackle its records management issues and, as Daum (2007, p. 43) expressed, move "from ad hoc to adherence".

Lastly, as Bedford and Morelli (2006, p.171) emphasized, it is very important for our records management programme to be more user-focused instead of being perceived as an IT project, the main reason being that the users might express some contempt and scepticism towards a technological change in the organisation.

5. Key recommendations for a records management programme for *Cocoa Bean*

Investigation into the current issues of records management in *Cocoa Bean* allowed us to identify several aspects in need of special attention when considering improvements of existent records management procedures across all of the departments of the organization.

5.1 Development of a records management policy

As Daum (2007, p.43) states, "records management culture starts with policy development". As staff in *Cocoa Bean* were not familiar with records management principles, the importance of drafting a comprehensive, easy to understand and implement policy, cannot be underestimated. After all, it will serve as a core document providing "a solid platform for incorporating the general principles of <…> records management into day-to-day operations" (Smith, 2007, p.64).

Cocoa Bean records management policy will:

- address the importance of records within *Cocoa Bean*,
- be applicable for records of all formats (paper and electronic),
- address the requirements for records created in Cocoa Bean,
- relate to compliance with Data Protection Act,
- define the roles and responsibilities for staff creating records and the role of the records manager,
- address records access and security and preservation procedures,
- establish policy review terms.

To sum up, the policy will serve as a backbone of good records management in *Cocoa Bean*.

5.2 Development of a business classification scheme

In *Cocoa Bean*, staff use personal approaches to organize records. Therefore, with increasing diversity of records management practices, the need arises to investigate how this situation can be addressed and what filing structure would be most beneficial for the organization. Our recommendation is to start with developing of a functional business classification scheme (BCS), i.e. mapping key business functions followed by activities associated with them and transactions as evidence of these activities. The main advantage of this methodology is that classification based on business functions is more flexible, i.e. it is capable to facilitate organizational changes and better facilitate support "cross-departmental" records that might belong to the same business activity (Shepherd and Yeo, 2003, p.74). Figures 1 and 2 present an example of how BCS can be developed. The example illustrates how "Sales" and "Manufacturing" functions of *Cocoa Bean* can be broken down into several activities that are followed by several transactions. Furthermore, multiple records serve as evidence of these transactions. In this way we can gain a good insight into the nature and context of the records in *Cocoa Bean*. Moreover, we can identify records that have to be accessible by multiple departments, e.g. for effective
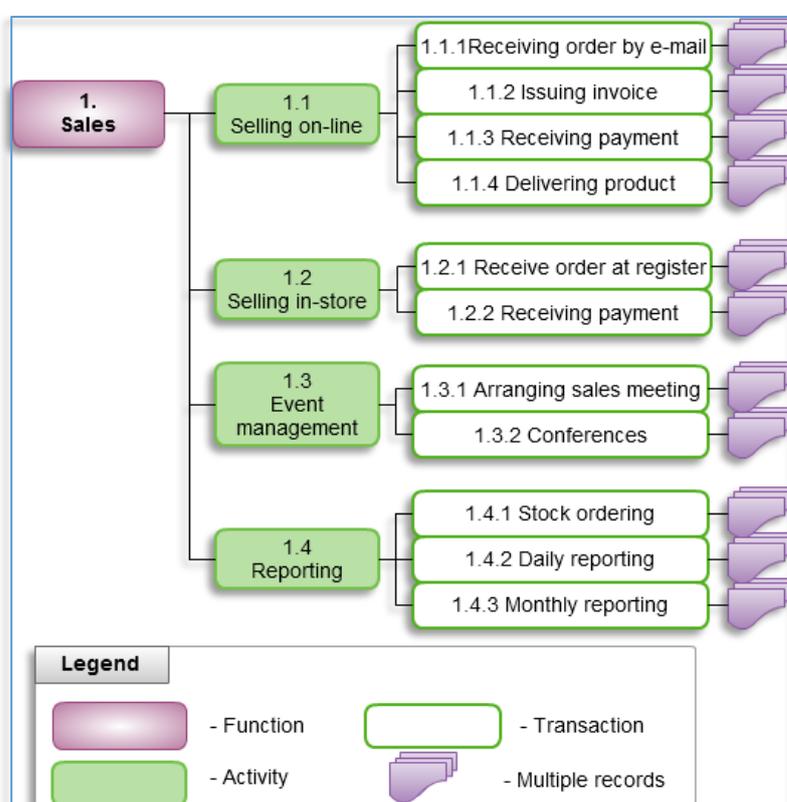

Figure 1. Sales function in Cocoa Bean

functioning, Sales, Marketing and Manufacturing departments have to be in-touch at all times. In most cases, this means that some records belong to more than one department and are meant to be shared.

Moreover, we will adopt an inclusive approach supported by Foscarini (2012, p.32) that promotes active participation of any individual of the organization in order to define "the cultural landscape in which function-based records are going to be built and used".

After mapping all business functions, activities and transactions, we will be able to strategically design a file plan that would most benefit the organization. After all, a file plan based on functional business classification will improve control and access of the records as well as their maintenance costs regardless of organizational structure (JISC/infoNet, 2007, p.3).
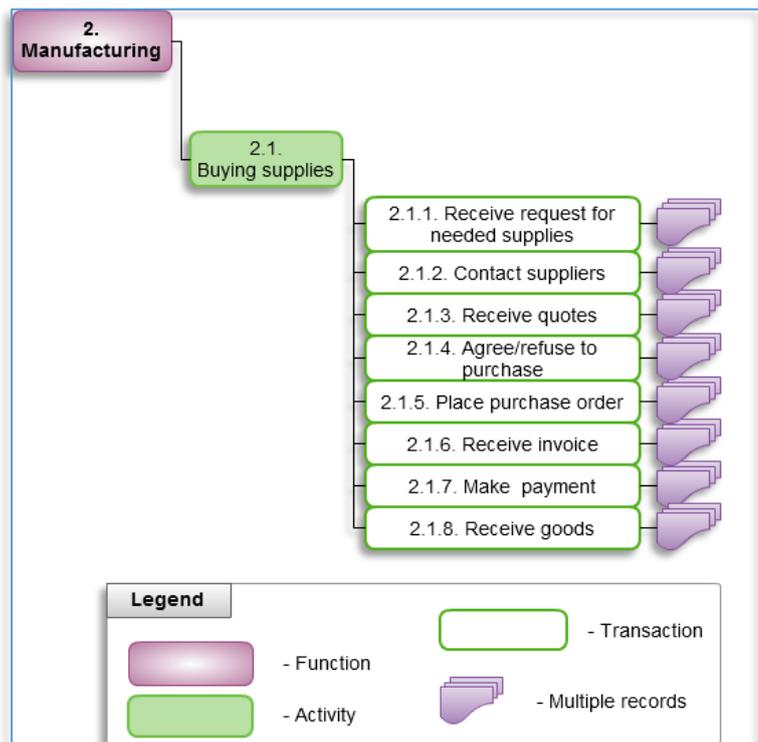

Figure 2. Manufacturing function of *Cocoa Bean*.

Lastly, drawing from Bedford and Morelli (2006) research findings about the implementation of business classification file plans into the organization, user-focused approach will be adopted, i.e. staff will be listened to and supported during the design, implementation and post-implementation stages. This aspect is detailed further in section 8.4 of the report.

The following section will present recommendations for ensuring records security in *Cocoa Bean*.

5.3 Ensuring records security

Unauthorized access of business records might pose risks for the organization by jeopardising its reputation and success (Smith, 2007, p. 514). Therefore, our recommendation is to implement measures that regulate access to records of sensitive nature or the ones containing personal records of the organization. This can be achieved by creating personalised access to the system for different users, i.e. granting and denying access to the records depending on individual or group settings (Adam, 2008, p.169). Similarly, access to paper records can be regulated by implementing lockable file cabinets.

In addition, our project will address all necessary regulations and procedures in order to fully comply with Data Protection Act 1998.

Lastly, *Cocoa Bean* needs to address the risk of business disruption or possible shutdown in case of a disaster. Therefore, it is essential for *Cocoa Bean* to identify its *vital records*, i.e. those whose loss would pose greatest threat for organization or "without which [the organization] could not continue to function" (Shepherd and Yeo, 2003, p.210). Duplication and dispersion or storage in a fire-proof safe are the main methods to ensure their security (ibid.).

The following section will briefly discuss the importance of records retention and disposal strategy for *Cocoa Bean.*

5.4 Records retention and disposal

The importance of defining retention periods and disposal strategies cannot be underestimated, the two main reasons being:

- storage and maintenance costs, and
- protection of the organization against legal action.

First of all, constant growth of electronic and paper records will affect the speed and efficiency of their retrieval. Also, storing abundance of records that are not in use anymore clogs the system and might increase virtual or physical storage costs.

Secondly, as records serve as evidence of business transactions, untimely destruction or, on the contrary, prolonged retention of records might violate requirements set in Data Protection Act 1998 or compromise the organization in case of the need to prove a certain action.

Lastly, records retention and disposal criteria will be largely influenced by the business classification scheme as it provides an in-depth view of the context and value of the records within the organization. Supporting Man's (2010, p.115) view, we will consider BCS to be our primary means for determining the value of the records and "legal and organizational requirements governing their retention".

5.5. E-mail management

In *Cocoa Bean*, important negotiations with suppliers and customers, also enquires and custom orders are being sent and received by e-mail. Therefore, as email is considered to be "the primary business tool for both internal and external communication", many important

records end up being "stuck" in e-mail boxes that, as a result, has impact on their access and retrieval (Smith, 2007, p.100).

For this reason, *Cocoa Bean* would benefit from the implementation of a corporate e-mail policy that would clearly define the procedures of capturing the record and transferring it from e-mail inbox into the records management system following the established naming conventions for easier recognition and retrieval.

Overall, tackling records management issues at their "root", i.e. establishing organization-wide policies and procedures, will bring a range of long-term business benefits for *Cocoa Bean.* Therefore, the following section will present tangible and intangible benefits *Cocoa Bean* will achieve by improving its records management.

6. Projected benefits and costs

Considering the nature of business and current situation, the following benefits were single out as expected long term results of improved records management in *Cocoa Bean*.

- **Increased business transparency and accountability.**

 By implementing policies and procedures for improvement of records management, *Cocoa Bean* will ensure it is complying with Data Protection Act 1998 and will easier respond to possible internal audits.

- **Increased efficiency**

 Standardized file naming storing conventions will reduce time needed to find needed records and, in this way, will increase efficiency of day-to-day processes.

- **Improved stakeholder relations**

Improving records storage and retrieval *Cocoa Bean* will achieve better communication with its stakeholders, e.g. faster response to supplier or customer enquiries due to better view and retrieval of needed records.

- **Reduced recordkeeping costs**

With successful implementation of records retention and disposure *Cocoa Bean* will reduce records storage costs for physical and digital environment.

To sum up, as *Cocoa Bean* is both retail and manufacturing company, improved records management will positively impact a wide range of business functions, including:

- Order processing
- Accounting
- Product scheduling
- Marketing
- Post-sale service and other value chain activities (Saffady, 2011, p.41)

In order to achieve projected benefits, the project will require some financial resources. Based on recommendations provided by The National Archives (UK)(2010, p. 12) and *Cocoa Bean* organizational context, the key areas that will need to be considered for budget provision are:

- o **staff** – existing *Cocoa Bean* staff participating in the project and a part-time records manager that will ensure compliance with newly drafted policy and other requirement for records management procedures (email management, records storage, records naming conventions, adherence to the legislation, etc.). Project team is listed in section 8.2.
- o **secure storage facilities** – new, lockable file cabinets will need to be implemented to ensure records security.
- o **training and communications** – support provided during and after system implementation phase (more detailed discussion – in section 8.4 *Change management*).

7. Methodology

In order to develop a well-rounded records management programme, our project will be based on the DIRKS (Designing and Implementing Recordkeeping Systems) Manual, provided by The State Records Authority of New South Wales, Australia. As DIRKS is concerned about "building more efficient and accountable business practices through the design and encouragement of good recordkeeping across an organisation", we consider it to be the most suitable methodology that provides a thorough, step-by-step guidance and approach for successful design and implementation of records management programme (The State Records Authority of New South Wales, 2003). In short, DIRKS provide a step-by-

step guidance for creating a records management programme, with an option not to follow the sequel provided but, instead, adjust it to custom needs instead.

Step A - Preliminary investigation

Step B - Analysis of business activity

Step C - Identification of recordkeeping requirements

Step D - Assessment of existing systems

Step E - Identification of strategies for recordkeeping

Step F - Design of a recordkeeping system

Step G - Implementation of a recordkeeping system

Step H - Post implementation review (*ibid*.)

The scope of our business case does not go beyond step A of DIRKS methodology as our main purpose is to understand current business issues related to records management, explore the solutions, address problematic areas and consider benefits and costs of proposed project for solving the issues. Therefore, the process of development and implementation of records management system for *Cocoa Bean* will follow steps listed above and build on the issues addressed in section 2 of the report.

Also, our recommendations at present moment are based on preliminary investigation and are open for fine tuning during later steps of DIRKS.

In addition to DIRKS framework, we recommend using ISO 15489, an international standard for records management, as best practice guidance for developing policies and procedures.

The following section of the report will detail how project of designing and implementation of a records management system for *Cocoa Bean* will be managed.

8. Governance

8.1 Project scope

Considering the size of *Cocoa Bean*, the project will be implemented organization-wide.

The primary goals of the project are:

- Develop a records management system that suits *Cocoa Bean* organizational context and business needs.

- Determine specific procedures for records creation, storage, retention and disposure.
- Develop a records management policy that addresses *Cocoa Bean* records requirements, access and security, governing legislation and staff responsibilities towards recordkeeping.

8.2 Project team

In order to ensure good understanding of business processes and needs, we propose the following team for the project:

- Laura Zaliene – Records Manager
- Arnold Monahan – IT consultant
- Sarah Smith – Manager, Human Resources
- David Murray – Manager, Sales Department
- Kate Roswell – Manager, Finance Department
- Ferdinand Walton – Manager, Manufacturing Department

8.3 Planning and implementation schedule

Proposed duration for development and implementation of the records management system for *Cocoa Bean* is 6.5 months. Figure 3 presents project stages as well as the
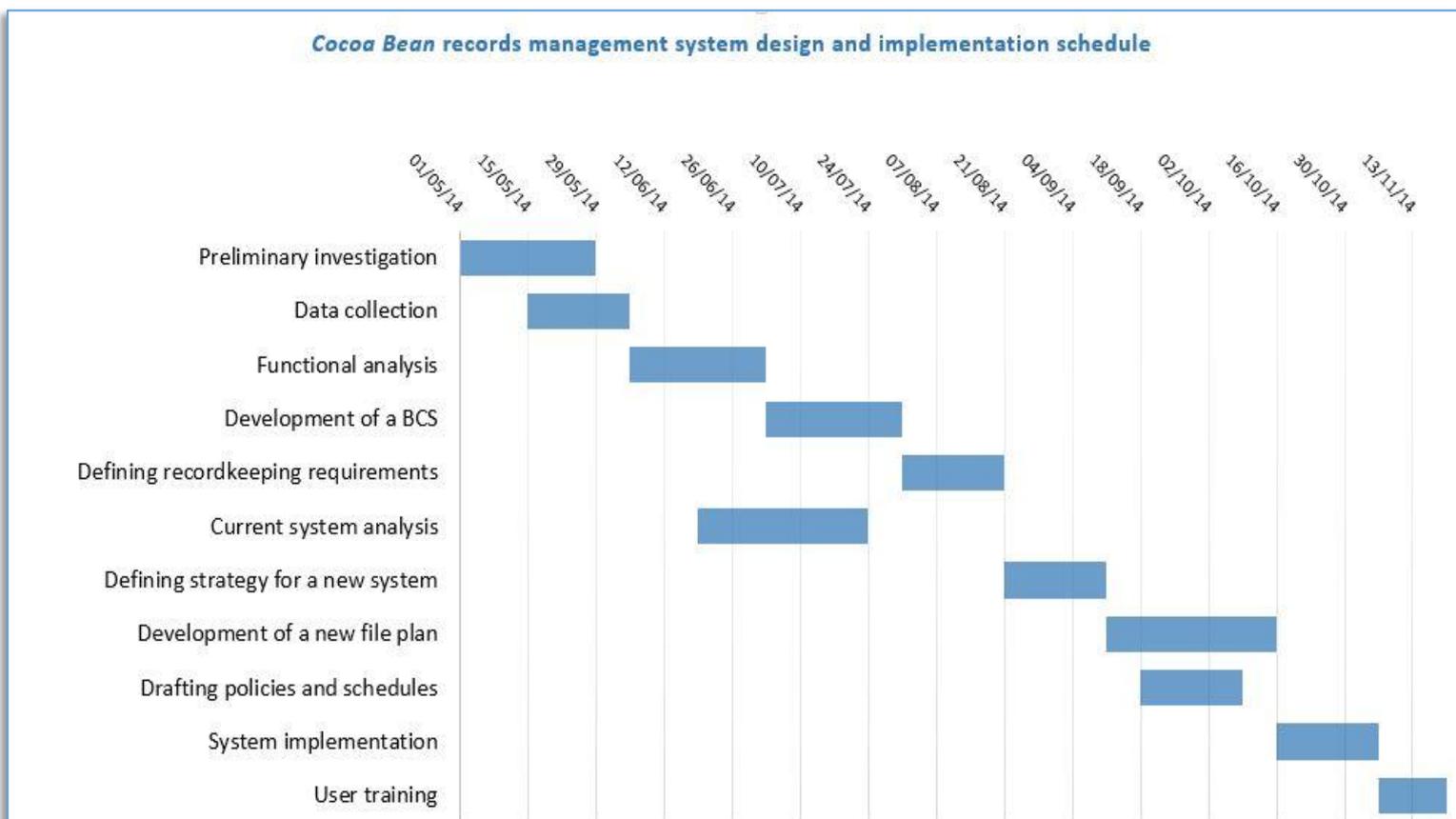

Figure 3. System design and implementation schedule

duration of each process.

It has to be noted, that some steps of the project are overlapping, e.g. current system analysis can be conducted during stages of functional analysis of *Cocoa Bean* and the process of developing business classification scheme. Moreover, a new file plan can be developed simultaneously with drafting new policies and defining other recordkeeping procedures as these two stages are complementing each other.

8.4 Change management

Records management training and communications are perhaps the most significant part of evolving a records management culture (Daum, 2007, p.44).

Throughout the literature, the importance of training and communication with staff were defined as the main factors for the success of any records management programme.

For example, National Archives of Australia emphasize the importance to recognize records management system implementation as a change management project (2010, p.6). Moreover, staff training and participation in developing the classification scheme will have a positive impact to overall "user-friendliness" of the system (Gunnlaugsdottir, 2009, p. 54). Therefore, apart from implementing a new records management system, our focus is to support its sustainability, i.e., as Daum (2007, p.43) expresses, "to close the gap caused by embedded personal work habits and department silos". And this, in turn, cannot be achieved without active staff involvement and awareness of the principles of the new system and procedures. After all, it is essential to achieve the system that is accepted and, with sufficient training and well established communication, is the system "that users want, not just the one they must use" (Wilkins et al., 2009, p.50).

Thus, our project will focus on facilitating active communication with *Cocoa Bean* staff, in order to better understand business processes and transactions. Also, post-implementation phase of the project will involve user training, providing advice and raising awareness of new policies and procedures.

Lastly, in order to achieve projected benefits, the project will require some financial input. Therefore, the following section will consider costs of the new records management programme for *Cocoa Bean.*

9. Conclusion

New records management systems go beyond new policies and file plans. Any organization embracing this change is facing overall shift in organization's culture where daily activities by all staff that create and manage records are affected. Therefore, strategic planning is essential- from the beginning by gaining deep understanding of organization's functions and activities, to the very end when it is essential to establish user awareness, acceptance and comfort in using the new system.

Therefore, we are confident that, with thorough planning, adherence to DIRKS methodology and ISO 15489 standard, we will develop and implement a sustainable records management system that will bring long term benefits for *Cocoa Bean*.

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