

# Federal Government Special Interest Group (FEDSIG)

Kickoff

October 22, 2015, 11am EST

Online at:

<http://community.aiim.org/federalgovernmentsig/home>

# Agenda

1. Welcome - Betsy Fanning, AIIM; Mark Patrick, DoD
2. Introductions of the planning team
3. Federal SIG Goals - Meg Phillips, NARA; Steve Levenson, U.S. Courts
4. Rules of Behavior - Jack Frost, IQ Business Group
5. Icebreaker Presentation - Mark Patrick, DoD
6. Way Ahead
  - A. Frequency of meeting – Quarterly (to start)
  - B. Next meeting – January, date TBD
  - C. Topics developed on web site. Email [bfanning@aiim.org](mailto:bfanning@aiim.org) to join!

# Ice Breaker Presentation

# The Data Lens

How to analyze information flow at *any* organization

Mark Patrick

Chief, Information Management Division

Joint Staff Secretariat, DoD

Note: These slides do not reflect the official views of the US Department of Defense, or the Joint Staff. They are product of the author only.



# First things first...

People are the most important thing



# *Then* Processes & Tools

Now that we've got that cleared up...



# Why do we do what we do?

- Decision Support
- Senior leader situational awareness (senior leader knowledge)

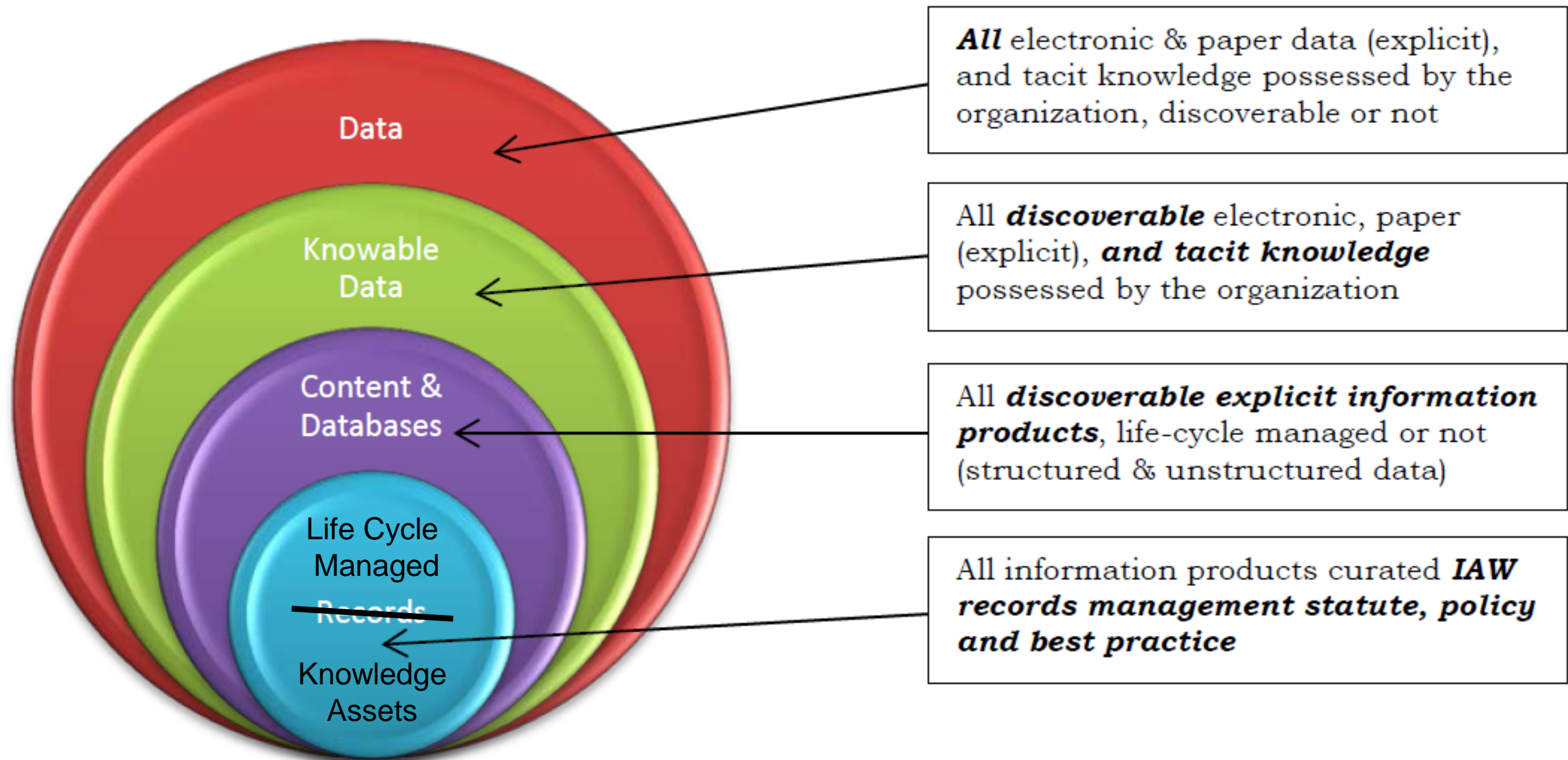




The laws are just there to make sure we do this well, and can be held accountable

Compliance isn't the end game -- don't be distracted!





# The Data Lens – As Is

How to look at *any* organization's information



# Five Fundamental Activities

- Task Management
- Records Management
- Collaboration
- Search
- Business Intelligence (Data Analytics)



# Precise Language is Key

- **Knowledge** is something in someone's brain -- not electrons or paper.
- **Information.** Root word is "inform." If it doesn't inform, it is only an information ***product***. It can transfer knowledge if it is moved and synthesized into a human brain.



# A word or two about **tools**

- Not about software
- Not about an app
- Could be a whiteboard
- Could be index cards
- A vocabulary problem
- KMs don't like "technology" but IT Pros misunderstand "tool" -- be aware





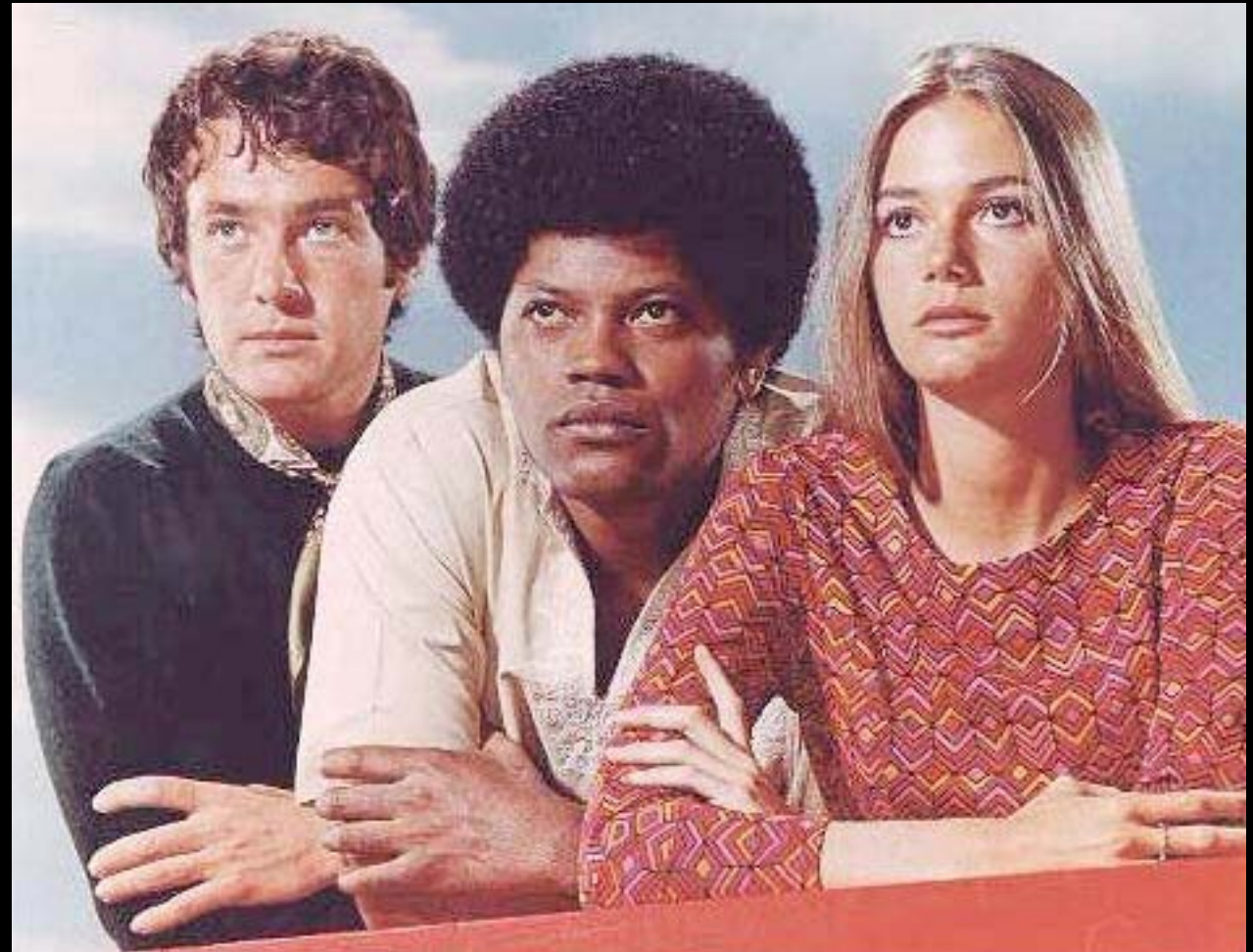
# People turn data into knowledge

Then they need to transfer that within the organization, generally creating information products (records) to do so.



# Tools and Processes facilitate the transfer of knowledge

- Use information products...**content** (or unstructured data)...hopefully life-cycle managed
- Use data from **databases** (structured data)...hopefully scheduled
- Tacit knowledge? Metadata tagging the **human brain**...
- The **Records Manager**, the **Knowledge Manager**, and the **IT Professional** are natural allies -- if we're all working for the same goal...

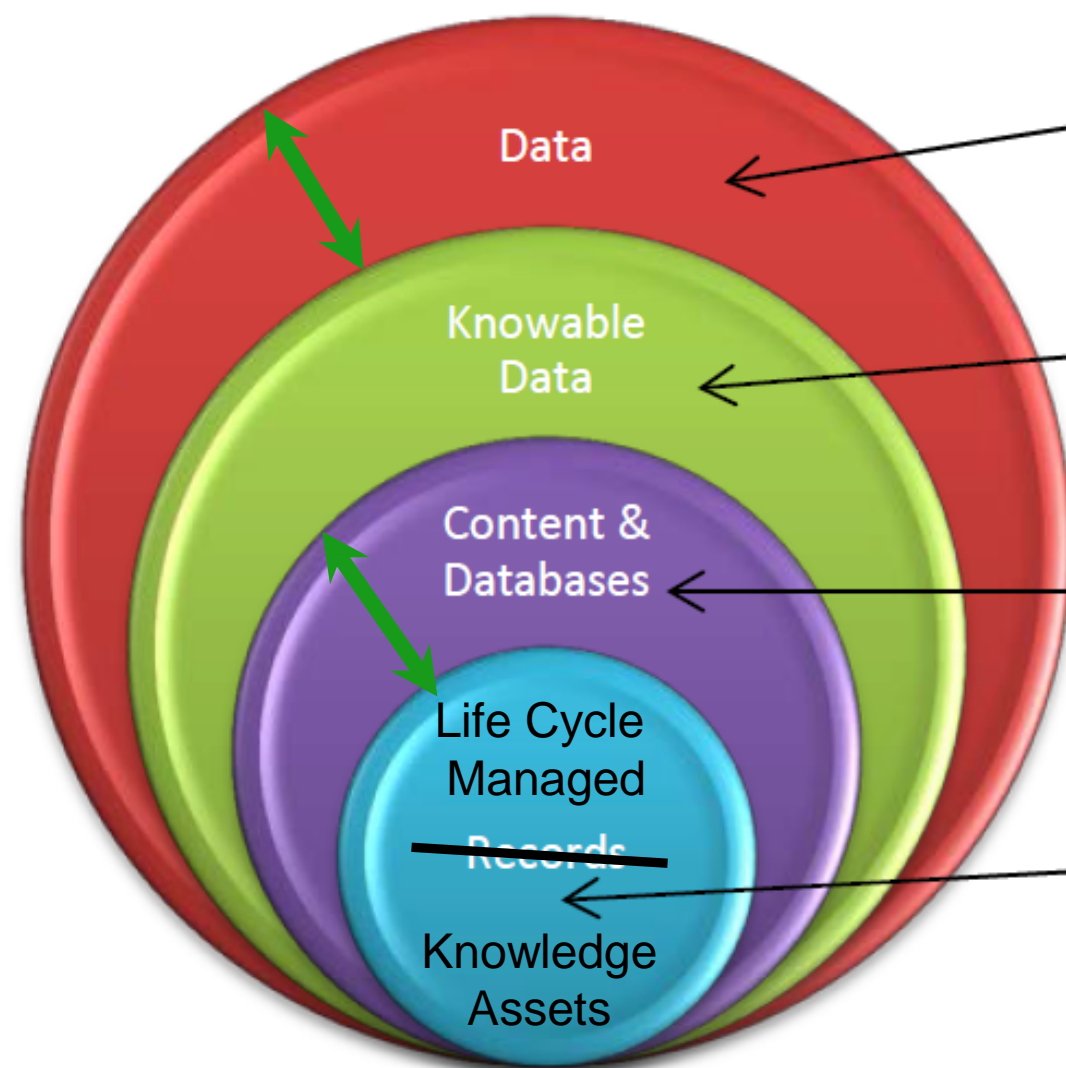


# Speed and Quality Count



Otherwise you get poor decisions, or even wise decisions,  
but too late.





**All** electronic & paper data (explicit), and tacit knowledge possessed by the organization, discoverable or not

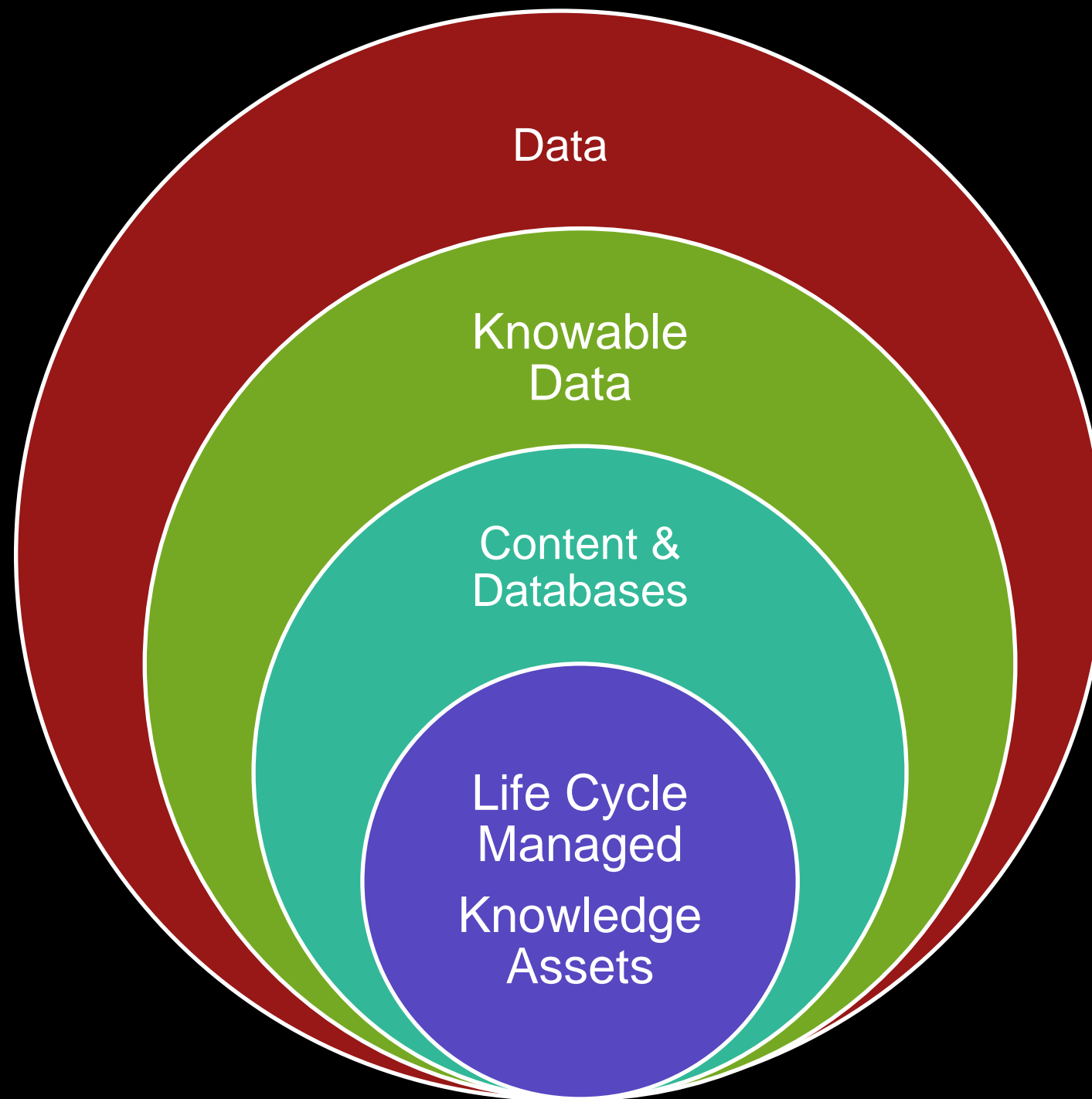
All **discoverable** electronic, paper (explicit), **and tacit knowledge** possessed by the organization

All **discoverable explicit information products**, life-cycle managed or not (structured & unstructured data)

All information products curated **IAW records management statute, policy and best practice**

# The Data Lens – As Is

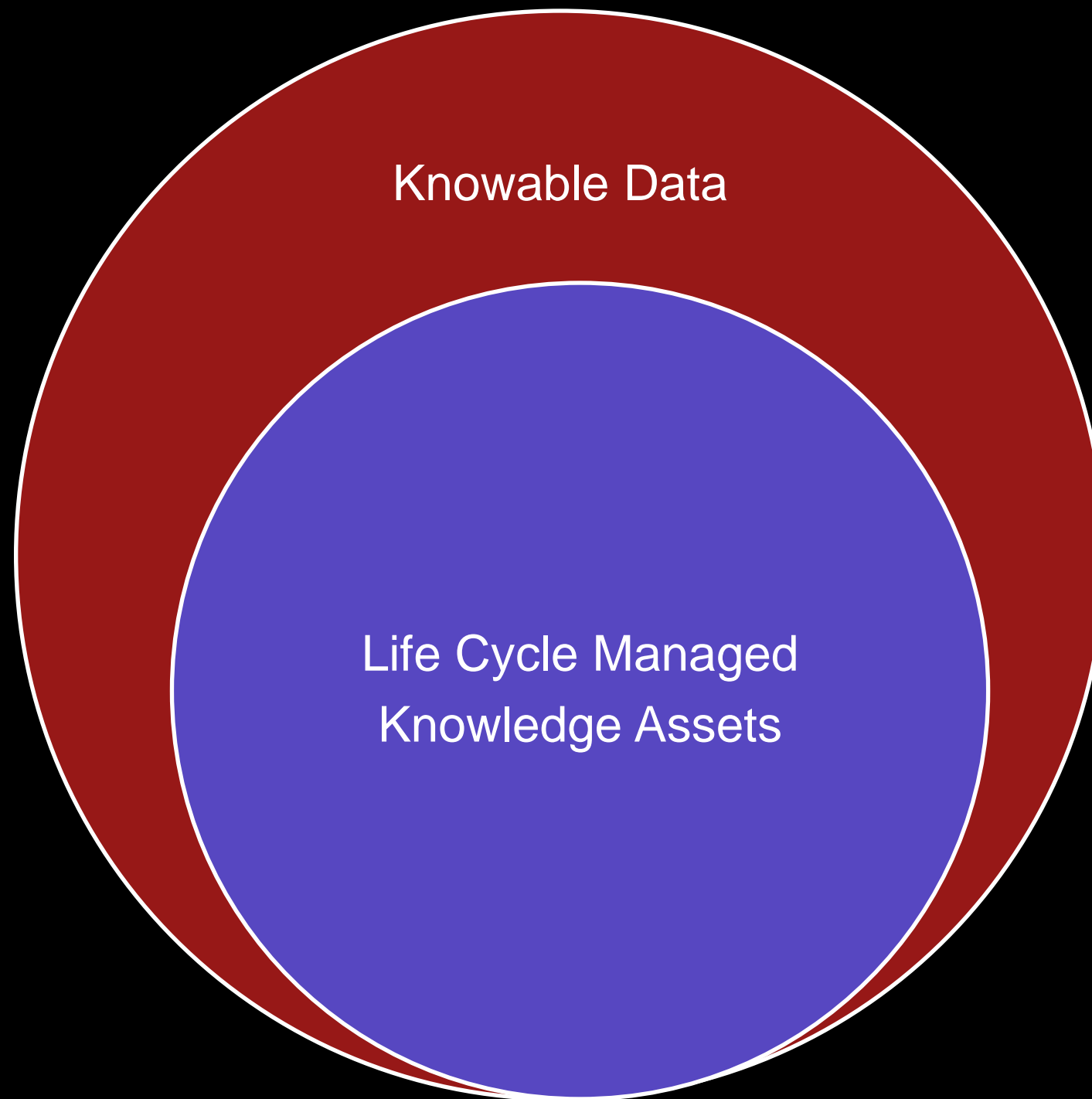
Collapsing the Data circle, and the Content & Databases circle...Make it all **knowable**, and **lifecycle managed**



## The Data Lens – To Be

Collapsing the Data circle, and the Content & Databases circle...Make it all ***knowable***, and ***lifecycle managed***





## The Data Lens – To Be

Collapsing the Data circle, and the Content & Databases circle...Make it all ***knowable***, and ***lifecycle managed***

# Decision Support and Situational Awareness for Senior Leaders

...Knowledge Management enables situational awareness...Records Management enables Knowledge Management...IT enables both of these

# Not a senior leader?

Everyone else  
is a customer too.





But remember, **people** are the most important thing.





# Areas we need to improve

- Marketing
- The User Experience (UX)
- Automation
- Collaboration
- Just-in-time training
- Process Management



# It's simple.

Use the *data lens* to analyze  
your *five fundamental activities*,  
and the combination of *people, processes and tools*  
that you use to accomplish *timely, high-quality*  
*Decision Support* and *Senior Leader Situational Awareness*



# Then fix it.

You'll know *what* to do...  
and *who* you'll need to work with to get it done.



# How to pay for the fix?

Once you **and your allies** help your senior leaders understand what *it* is -- that it's critical to the organization's mission, then that's where they come in...

to insure you have the **resources** you need to fix it. **The good news is that if you do it right, you'll conserve resources in the end.**

Then we can all just go back outside and play.







# Questions?

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@jsinfodude

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