

# Agile Teams to Support a Records Management Program Implementation

## The Challenge

The client needed to establish a records management program with enhanced reporting and content sampling capabilities. The goal in this initiative was to allow the organization to view and use EDI claim data efficiently and easily. The Enterprise Content Management (ECM) Group was dealing with a massive amount of historic claim data from disparate sources with over 1,000 different document types. They struggled to understand the document type, age, and owners of the content, as well as the use cases and frequency with which it is used in their business processes.

## The Solution

Eliassen provided an Agile Project Manager with electronic document management experience and a Content Analyst with strong record & information management experience. These resources were sourced to assist the ECM team with this large-scale record management project specifically in relation to content classification and retention analysis. The data was not easily accessible and required them to leverage their analytical skills to work with different teams across multiple locations. They successfully aligned with the records management teams and compliance departments to filter the historical documentation. They were flexible, having to change course several times, and their resiliency and responsiveness to feedback made for a positive impact on the records management project and the entire team.

## The Client

### Health Benefits Company

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The client is one of the largest health benefits companies in the United States. They deliver solutions through a portfolio of integrated health care plans and related services, along with a wide range of specialty products.

## Highlighted Results

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- Creation of the new records management system
- Establishment of business objects reporting, allowing new visibility into operations
- Identified over 34 million records to be legally disposed of

## The Result

- Establishment of a records management program:
  - Client now has a documented, Legal-approved content sampling strategy
  - Execution of this strategy for their first representative content group: Enrollment
  - Defined, built, tested, and implemented a bulk content deletion utility for purging content marked for disposal
  - Identified >34m records in Enrollment alone to be legally disposed
  - Identified Legal Hold documents within the Enrollment space
  - They have built a strong and trusting relationship with product owners in records management
- Establishment of business objects reporting, including completion of an effort to build and implement transactional/usage reports across BPM workflows.
- Project Management of non-imaging of EDI claims.
- Establishing a solid team within the complex organization.
- Completion of the proof of concept, which realizes the vision for efficiency in EDI claim data accessibility.