



CENTRAL HIGHLANDS WATER INCREASES THE VALUE OF ITS BUSINESS INFORMATION WITH ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM

Case Study

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**CENTRAL
HIGHLANDS
WATER**

Objective

To deliver improved compliance with statutory and legal obligations, and introduce operational efficiencies

Approach

Conducted an internal audit in which recommendations were used to develop a holistic records management strategy to deliver a records management programme

IT improvements

- Automated document management simplifies processes, and manages entire lifecycle of business information from creation to disposal
- Reduced times for storing and retrieving paper records from hours and days to minutes

Business benefits

- Improved compliance with statutory and legal obligations
- Gained confidence in the integrity of business information
- Improved collaboration across the organisation from sharing business information which supported employee productivity
- Reduced duplication which improved quality of information and eased staff frustration



Central Highlands Water (CHW) is a regional utilities supplier based in the city of Ballarat, Australia. It provides water and wastewater services to a population of approximately 124,000.

In the context of its day-to-day business operations, CHW captures, processes, manages and stores vast amounts of business information in the form of correspondence, technical plans, images, email, CCTV, etc. This amounted to millions of paper and decentralised digital files, with more being created every day.

“We were very much paper-based and while we had a network drive environment, we depended heavily on individuals and how they controlled information,” says the Knowledge Management Team.

HP customer case study:

HP TRIM and Kapish TRIM Explorer boosts the value of Central Highlands Water’s business information

Industry:

Water utility



“Our records management system was inefficient, labour-intensive, vulnerable to errors and non-compliant with record-keeping regulatory requirements. We possessed limited searching tools and a lot of time was wasted getting access to the right information. Plus, we were uncertain whether the business information accessed was the most recent.”

Functionality and compliance

The inefficiencies and lack of structure associated with how CHW managed business information prompted the organisation to tender for an electronic document and records management system.

“After evaluating four systems, we settled on HP TRIM software and Kapish TRIM Explorer. The reason is simple: it met our functional needs, was easy-to-use and could be integrated with our Windows® Explorer environment. Plus, it provides a central repository for business information and enables us to better conform to a host of regulatory standards.”

CHW engaged the services of Kapish, an HP Partner and HP TRIM specialist, to design, build and implement the solution. The company also provided Kapish TRIM Explorer, an off-the-shelf product developed by Kapish that takes the functionality of HP TRIM and delivers it within the more familiar interface of Windows Explorer, to improve usability and uptake of the system.

Managing change

Once the decision was made to deploy HP TRIM, CHW embarked on a comprehensive change management programme from the outset of the project. This was led by a third-party professional change manager, Ms. Helen Palmer, from the RHX Group Pty Ltd, to develop and support a programme to drive faster adoption, greater utilisation and higher proficiency on the changes impacting employees in the organisation.

“Our vision with HP TRIM is to manage the entire lifecycle of business information, from creation and capture right through to disposal. To achieve this, we knew we had to change the information management culture of our organisation and ensure active involvement of all staff. That is, we needed to align their understanding and use of business information to our vision.

“We understood that software is just one of the elements in our records management strategy. The other critical success factors that would influence widespread adoption included procedures and rules, education, awareness, ownership and buy-in.”

Mindful that a deployment would be difficult, CHW opted to ease staff into it with a phased approach, allowing time for staff to be willing to the change, and providing them with the understanding to use the new system. “Resistance to change is inevitable,” notes the Knowledge Management Team, “that’s why usability of the software was so important to us. It was also important for staff as users of the software had their say in how it was to be designed and communicated.”

Increased confidence

The organisation's commitment to change management was evident by developing an in-house training facility. This was used to train 155 people in the use of HP TRIM and Kapish TRIM Explorer along with the underlying records management processes.

"Initially, we wanted to get our people's buy-in. We explained the reasons for adopting good record-keeping, by outlining advantages and detailed their responsibilities. Then we focused on getting people to start using HP TRIM and populating it with business information. Now we're concentrating on introducing functionality, bit by bit to use business information in smarter ways."

"While pockets of resistance to change inevitably exist, the majority of our people are using HP TRIM and their confidence in our business information is rising. Considering we never had a solution like this before we have done a terrific job in supporting and adopting the change that comes with it. Our journey is far from over, yet we are working towards achieving 100 per cent buy-in between the next eight to twelve months."

Meeting the demands of regulation

Today CHW is now in a position to better manage its regulatory obligations under the Public Records Act.

"With HP TRIM and Kapish TRIM Explorer, we've simplified the capture, access, management and security of business information regardless of its source. This enables authenticity, integrity and reliability of corporate records. In turn, having fast and easy access to a business information trail reduces the operational risk of regulatory compliance and improves users' efficiencies and process optimisation," notes the Knowledge Management Team.

Upsurge in electronic records

CHW is making good headway in replacing paper-based records with electronic records. It is now embarking on a large scale digitising initiative to capture half a million documents from its property filing system.

"We have records dating back to approximately 1920 which tell us how we've been servicing a particular property. We're bringing these into HP TRIM, which will be extremely beneficial from a CRM or billing perspective," says the Knowledge Management Team.

Improving collaboration

Having a central repository for all CHW business information is improving business efficiency and staff productivity. Procedures and supportive documentation enables easy capture, secure management and discovery of corporate records.

"We're benefiting from improved collaboration across the organisation, particularly in terms of sharing business information effectively. This is delivering a reduction in duplication, which is saving considerable time and effort," says the Knowledge Management Team.

Reducing staff frustration, less duplication

With over 100,000 records stored in HP TRIM, the ability of CHW staff to find the right information at the right time and in the right way has been improved.

"Reducing staff frustration by improving searching capabilities and access to information is another advantage. We now have an organisation-wide information platform that will support future practices such as simple workflows and digitising as well as facilitating the publishing of content to a new intranet," explains the Knowledge Management Team.

"Having automated our record-management processes limits the number of steps and manual handling of business information. This not only reduces duplication but it also increases productivity. We've cut times for storing and retrieving paper records from hours or days to minutes or seconds."

Looking ahead

The Knowledge Management Team at CHW believes that excellent progress has been made in its records management journey. The Team is now focused on expanding the usage of the solution throughout the organisation and ensuring it becomes the core repository for every single piece of business information.

“We’re also looking beyond records management and thinking about how we can use HP TRIM and the range of Kapish TRIM Add-ons to better support our operations. For example, leveraging functionality to publish information to intranet sites and other such measures.”

On the whole, HP TRIM and Kapish TRIM Explorer are improving business efficiency, staff productivity and engagement, as well as CHW’s ability to better meet regulatory compliance obligations.

Customer solution at a glance

Primary applications

- Proprietary CRM and customer billing system
- Payglobal Payroll system
- Greater Plains Financials
- Asset management

Primary software

- HP TRIM
- Kapish TRIM Explorer



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