

EDRMS Project Team Skills Evaluation Checklist

Use this checklist to evaluate the attitude, knowledge and skills of the team. Not all team members need to have the skills or knowledge, although a critical mass of the team must have the right attitude.

Team Attributes	x/√
The right attitude; is our team seen to be:	
Consistent in their approach to people and the tactics to create the driving environment for change.	
Persistent in the face of resistance from all levels of the organisation.	
Insistent on the need for change and the need for people to take accountability for processes.	
Flexible enough to create and execute alternative tactics to achieve the change goal.	
Highly effective under criticism and misunderstanding.	
Does our team have the knowledge of:	
Recordkeeping	
Current recordkeeping practices, legislation and regulations.	
EDRMS	
EDRMS functionality which improves productivity and reduces risk (including that we are not using now).	
Current security practices and how this can be managed in the EDRMS.	
Change management	
How to drive individual adoption of changed processes.	
Creating an environment in which individuals adapt readily to changed processes and/or changed roles.	
Communication techniques and their appropriate use in assimilating knowledge.	
Communication preferences and their general distribution profile in the community.	
Business processes	
Business unit processes which are reliant on: <ul style="list-style-type: none"> • having one source of accurate information or, • keeping information secure or, • having a timely review and approval process or, • processing information from many different sources of information to make decisions. 	
Training	
Training needs analysis approach (detailed).	
Learning and development approaches able to close the knowledge and skill gap of end-users.	
Does our team have the right skills; the proven ability to:	
Recordkeeping	
Create a BCS with less than twelve classifications.	
Create a one page policy.	
Create procedures which are easily understood by end-users.	
Interpersonal skills	
Build teams through interpersonal understanding and communication skills.	
Use participative leadership style, switching to a directive style when necessary.	

Personal skills	
Be organised and disciplined, yet flexible.	
Prioritise tasks in a changing environment.	
Project management	
Scope projects and design and develop project controls.	
Plan tasks and resources.	
Develop and manage project budget, development of management systems to monitor and forecast implications of internal and external environment on costs.	
Respond to internal and external environments to ensure project objectives remain aligned to the business unit's objectives.	
Test and respond to perceived, potential and actual schedule changes to achieve project objectives.	
Monitor and control project cost.	
Identify, assess and evaluate risk and create treatment plans to reduce the risk to an acceptable level.	
Change management	
Create and implement stakeholder management plans that move high power passive and active opposers of the project to neutral stances and passive supporters to active supporters.	
Design and develop tactics to move the organisation along the pathway to engagement: <ul style="list-style-type: none"> • Understand the need for an EDRMS and the project design • Believe that EDRMS will be good for the organisation • Prioritise their teams work effort to fit in the EDRMS implementation • Plan for the implementation • Actually implement the EDRMS and any changed processes required 	
Design, develop and execute tactics to drive individual adoption, helping end-users believe the adoption of good recordkeeping practices is good for them, is the norm and that they have the capability to do so.	
Communication	
Design, develop and execute communication plans to help stakeholders feel, think and do that which is consistent with the project deliverables.	
Utilise appropriate communication channels dependent on the complexity of the message	
Design and develop internal brand attributes for the project.	
Business process analysis	
Analyse where EDRMS functionality can improve productivity and reduce risk.	
Analyse the use of EDRMS functionality may cause unintended consequences.	
Training analysis, design and development	
Complete training needs analysis comprehending: <ul style="list-style-type: none"> • project goals • maturity of EDRMS skills and practices • attitude and culture within the organisation and leadership strength and style • logistics and locations • internal support staff availability and skills • available technology • internal and external budget (including business units). 	
Design and develop layered training.	
Design and develop experiential learning.	
Design and develop eLearning.	
Design and develop training follow up program.	