



## **Changing the way BT worked with documents**

This case study describes a major project undertaken within BT up to 2004.

### ***The need for management***

By 2001, various groups in BT had recognised that they needed to invest in document management systems. Some needed them for regulatory reasons, some to enable widely-dispersed teams to collaborate, some to ensure that the right version of a bid was sent to customers. As these were all local initiatives, a variety of systems were used, making it difficult for different parts of the company to collaborate and share information.

As Head of Information Infrastructure for BT, Clearsight Consulting's founder Heather Alexander successfully led the procurement exercise to select a single document management system for use by every part of BT. A challenging enough task in its own right, given all the different requirements and entrenched opinions. However as the chosen system was made available to those who wanted it, it became clear that BT could realise substantially greater benefits if the system was available to every BT employee and contractor, as well as to selected partners and customers. Such a move would make it possible to re-design many document-related processes, as well as meeting the needs of new regulations affecting the company, such as Sarbanes-Oxley. Consequently, an enterprise-wide licence was negotiated.

### ***Implementing the system***

The license agreement was in place by summer 2003, but the hardest part of the project remained – rolling out the service and persuading 110,000 people who work in and with BT to use the system and gain the full

benefits. The enthusiasts who will try anything are all very well, but convincing the vast majority of people that they no longer have to hold all “their” information on their own PC or on their old document system was a much bigger challenge.

By the time the project was handed over to BT's Group Communications team in autumn 2004, over 27,000 users had started using the system. There were many instances of teams who had changed their way of working. BT Procurement, for example, migrated all its documents to the system, from PCs, servers and emails. “All members of our team – wherever they're located and whether they're working from the office, home or travelling – have instant access to current information,” was the view of the Procurement project manager.

The new programme leader, Ross Chestney from BT Group Communications, said, “Heather's leadership during first two years of the project was crucial in transforming a series of local initiatives into a true enterprise deployment. Without that solid foundation, BT would not be realising the benefits it now is”.

If you are looking for help in buying and implementing a document management system (or indeed any other system), please contact Heather Alexander at Clearsight Consulting for a no-obligation discussion of your needs.

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