**Project Title: CFBE Document Library**

Project Owner: Barbara ­­­\_\_\_\_\_\_\_

Accountability Partner: Kristen \_\_\_\_\_\_\_\_\_\_

**Background:** *Why are we doing this? What problem is this supposed to solve? Why is this important to our strategic plan?*

We currently have no protocols around how we save and store important client and CFBE documents. Right now we have project deliverables, proposals, templates etc. on individual’s hard drives, the shared drive, iManage, EisnerAmper external website and The Pulse.

In order to be more efficient and avoid unnecessary risk, we need to address this situation.

**Project Brief/Team Charge:** *What is this person or team expected to achieve? Clearly articulate what will constitute success.*

Barbara is expected to -

1. Identify and document the key documents that need to stored going forward
2. Map out (with team) the most efficient process for preparing and saving these documents.
3. Explore and identify technology solutions to document management (shared drive, SharePoint, iManage, flash drives, computer hard drives etc…)
4. Make a recommendation as to which technology would best suit our needs considering such factors as :
   * 1. Highly mobile remote workforce
     2. Need to pull documents up on phone/iPad
     3. Access “off” network
     4. Individuals working independently who also need team involvement at ceratain milestones.
     5. Client information and final deliverables need to be stored in iManage.

**This will include undertaking the following activities:**

* With the team, identify the key documents that need to be readily available to the team.
* Review current team members process for saving documents
* Developing process flows and file structure for the saving and storage of key documents
* With process flows and needs identified, work with IT to identify the best technology tools to achieve our objectives.
* Develop and document naming conventions for documents
* Work with team to ensure existing documents have been re-named to match naming convention.
* Develop procedures document and train the team on process.
* Develop and document monitoring process to ensure adherence to the new procedures.

**Deliverables/Impact:**

1. Process flow for saving and storing each key document
2. Naming convention documented
3. Map of folder structure
4. System selection and implementation
5. Document Monitoring Procedure

**Decision Making/ Level of Authority:**

* Barbara will work with the team to design and develop the saving and storage protocols.
* Kristen will be the “sign off” on procedures documentation

**Team Members:** *Who will be working on this project? Who will be a consultant on the project?*

Barbara will work with everyone on the team to ensure a full understanding of the document management needs.

IT (Hrishi) will be a consultant on the technologies used to achieve our objective.

**Budget:** It is not anticipated that any funding will be required to complete this project.

**Timeline**: Deadline for full implementation **- January 31, 2019**

October 19 - Key documents identified

Naming convention determined and approved

Folder structure developed and approved

November 19 - Technology solution identified and configured

Existing documents renamed and put in files

December 2 - Train the team on new protocols

January 28 - Report on adherence to new protocols and identify any further issues.