



**ON THE PROFESSIONAL
EDGE in Australia,
New Zealand, the UK,
Canada, and the USA**

In a unique five-way interview, *iQ* talks to RIM industry leaders in five countries on three continents, to discover what gives them the professional edge and where they see opportunities for a professional edge for RIM in the future.

iQ: Successful sports people, actors, authors, adventurers and business moguls have various techniques for giving themselves a professional edge in their particular fields. Is there a philosophy that you have followed/borrowed to give you a professional edge in the way you do business?

Irene Gelyk: The philosophy that I have used is the motto from when I was a 4-H Club member in my teens, 'Learn to do by doing'. I've always been one to get in there and do the job and try to do it right the first time.

I've also told myself, and team members, to never be afraid to ask questions. When in doubt, ask. I'd rather take a couple of minutes to ask a question and get clarification than to discover that the job was not done right, and then have to spend hours to fix it.

Kate Walker: My philosophy? To make a difference in people's lives and organisations through expert advice, personal empowerment, and compassion.

Paula J Smith: My philosophy in business, as in life, is simple: respect the pitch and respect the opposition. You have to respect the organisation you are working for, its environment and its culture. While I don't always agree with everything that has happened in the organisations I have worked for over the years, I still respect them.

Likewise for your colleagues. And while I wouldn't go as far as to say that IT are the 'opposition', there have been times when it has felt like it! But everyone comes to the table with their own preconceptions, their own subconscious and conscious prejudices. The important thing is to respect them as individuals and colleagues, people with their own special skill sets.

Doug Allen: The philosophy I have followed throughout my professional career has been to master the knowledge base required of the field within which I work, to understand who to call on when I have gaps in that knowledge, and then to apply that knowledge in working with fellow professionals to meet the challenges of the moment.

Matthew Stephenson: A good friend is a senior manager at Gap, and 10 years ago they launched a campaign called 'Words to live by' to develop and engage their staff. Although they're rather glib, the principles behind them have stuck with me ever since.

They are very simple principles which, if you do live by them, give you a professional edge: Everyone Counts. Every Difference Makes a Difference. Own It, Do It, Done. Less is More. Simplify. Take the Smart Risk. Do it Better Every Day. And, Do the Right Thing.

iQ: Do you have a professional edge hero, not necessarily in RIM, who inspires you and/or the way you approach business? And why are they your hero?

Kate Walker: Oh, yes : Steven Paul 'Steve' Jobs, born February 24, 1955, co-founder and chief executive officer of Apple Inc. Due to his aggressive and demanding personality.

Mr Jobs has gone against the trend of enslavement to empowerment, ruling with an iron hand, attending to every little product detail, and keeping employees on a roller coaster of



About our interviewees

KATE WALKER, FRMA is currently the Chief Executive Officer (CEO) of the Records Management Association of Australasia (RMAA). From her base at St Helens, Tasmania, she also owns and operates IM consulting business Relevancy Pty Ltd, which pursues workflow, document and records management solutions as well as providing training and assessment in line with the AQTF Competency Framework.

Kate is a widely recognised advisor on knowledge management, information management, records and document management, e-business, workflow & image processing, process mapping & analysis, and information enabling technology.



PAULA J SMITH, ARMA, is the President of the New Zealand Branch of the RMAA. She works as an Information Management Consultant with Techtronics group Limited in Wellington, New Zealand. Involved in RIM in the UK and New Zealand for over ten years, she previously worked with a central government agency, regional fire service, a large shire council and a city council, and a Crown entity.

Paula holds an MSc in Records Management from the University of Northumberland and a BSc (Hons) in Business Information Systems from the University of Wales, in the UK. She is currently a mentor to two new entrants to the RIM profession.



MATTHEW STEPHENSON is Chairman of the Records Management Society, (RMS) the UK's leading records management association. Previously, he was the Society's Editorial Director and Chair of its Education Group, and was a member of the Records Management Group Executive Committee of the Society of Archivists.

Matthew works as Head of Information Governance at the University of Salford, UK. His 12 years in RIM have included appointments at the London School of Economics, as Records Manager, and at The National Gallery, Imperial College, and the Science Museum. He read Biology at the University of York, and has an MA in Archives and Records Management from University College London.



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praise and fear. Despite Mr Jobs' tirades, Apple employees are devoted, because, reputedly, his autocracy is balanced by his famous charisma.

Paula J Smith: I have a friend who inspires me every day, with her energy and her passion for life and work. She recently formed her own consulting firm and she inspires me with her bravery, but also her focus.

When we manage to catch up, even if it is just for a coffee, I am inspired all over again. She reminds me why I love RIM so much, and with her very infectious energy I feel like I can accomplish anything.

I also come back to my desk like a little Energizer bunny which, as my co-workers will tell you, is sometimes a scary sight!

Matthew Stephenson: Hmm, far too many to mention, ranging from TV personalities who I have never met to family members. I think what they have in common is being able to connect with people.

Irene Gelyk: Two people stand out for me. The first, my manager at a small city library. We did not see eye to eye, but through earnest discussion and listening to each other we realised that we could work together, accept our differences and make it work. We agreed to disagree.

The second was my director at a very large international accounting firm. I learned so much from her. She was strong,

opinionated, decisive, fair, supportive, compassionate, organised, honest and so many other things. She would let us get on with our jobs, but would be there if we needed her, and would defend us if needed.

What I learned the most from her was that you should never be afraid to make decisions, rightly or wrongly, and carry through.

Doug Allen: I would point to retired General Colin Powell. The story of his life is inspirational, his approach to achievement is admirable, and he consistently displays a true professional edge.

iQ: What, to your mind, is the one major thing that individual RIMs need to do to give themselves a professional edge?

Kate Walker: Create a benchmark for excellence.

Matthew Stephenson: Be an absolute expert at RIM, but be good at all the peripheral disciplines around RIM which impact on the work we do.

Doug Allen: Records and information managers need to focus on life-long learning. Our field has evolved quickly, and our ongoing educational needs will make a great difference in our future success.

Paula J Smith: We need to demonstrate our professionalism to our peers. If we want to stop being considered the filing clerks or purveyors of doom, then we must take this into our own hands.

As an industry, we must improve our communication and relationship management skills. We need to stop talking about 'compliance', 'taxonomy', 'disposal', and start talking in the language of our organisations. We abhor IT's use of jargon, used, as we perceive it, to exclude non IT folk. But aren't we just as guilty?

Irene Gelyk: Be lifelong learners. Don't be afraid to take risks. Don't be afraid to ask questions. I realise I've given three things, but I feel these are important. We need to learn and understand about technology and systems, management, people, leadership, the law, and ourselves.

iQ: What, in your experience, is a key thing that demonstrates professionalism in recordkeeping? Can you give a case in point?

Matthew Stephenson: To me, it's being able to change the way someone works for the better.

There's nothing more rewarding than going into an office of someone who has the attitude "I've been doing this job for 100 years and there's nothing you can do to teach me anything", and leave them an hour later not only working with a change you have recommended but evangelising about the difference you have made to the way they work.

Irene Gelyk: Professionalism, to me, goes beyond just recordkeeping. I think it is important to grow as person, develop skills and knowledge in many areas related and not related to RIM, study human nature and to pick out the career that sparks curiosity.

Curiosity is the driver that keeps me needing to learn more. RIM is a profession, and we all need to look at what other professionals are doing to expand their spheres of influence. How are others dealing with similar issues: globalisation, technology, career challenges, communication, project management, humanity, social injustice, the environment?

Doug Allen: The ability of records and information managers to articulate the value of RIM. The RIM who is best able to provide senior management with a persuasive case for RIM investment that emphasises return on investment, appropriate



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IRENE GEKYK, CRM is President of the Toronto, Canada Chapter of ARMA International. She is a Canadian Trustee of the ARMA International Education Foundation, and a member of the Records

Management Society (RMS) of Great Britain. Since 2005 she has been Team Lead, Records Management for BlackBerry developer Research In Motion Limited. Prior to her 20 years in RIM, she started out as a library technician, before detouring into computer sales, support, training, marketing, and computer graphics.

A recreational rower, in 1996-97 Irene sailed from the Bahamas to New Zealand on a 42' sailboat, via the Panama Canal.



DOUGLAS ALLEN is President of the Board of Directors of ARMA International. Based in Austin, Texas, in the USA, he works as Business Development Manager with Information Outsource, for Global 360's Work Management Group.

Doug writes regularly about RIM issues, and maintains certification as a Certified Records Manager (CRM) and Certified Document Imaging Architech (CDIA+).



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management of risk, and positive contributions to compliance will lead the most successful programme.

Kate Walker: Learn how people get motivated, like to receive information and how they make decisions. If you can't ensure that the information is in the right format, with the right person, at the right time, all contextual information is correct whilst demonstrating compliance, then recordkeeping will not be seen as a professional part of any organisation.

Paula J Smith: We don't do enough research, one of the primary requirements of any profession. It's time that we stopped waiting for the handful of researchers we do have to answer our questions for us.

It's time the profession as a whole took its destiny into its own hands, and at the very least formed the research questions that we need to answer. At times, it feels to me like we RIMs are like the electorate in New Zealand – apathetic.

iQ: If a RIM could propose, to their senior management, one key way that would give their organisation a more professional edge, what would it be?

Irene Gelyk: Senior company leadership who understand and fully support their RIM programmes are industry leaders, and they run smart, effective, secure and competitively intelligent organisations.

Without top down and visibly supported RIM programmes, your organisation might as well have a big target on the side of their buildings – especially if the company is publicly traded – that says 'We are ripe for law suites, intellectual property leaks, corporate espionage, security breaches and much more trouble'. E-discovery is becoming big business.

Say to your senior management, "Do you want your company to be the next Enron or Arthur Anderson? It doesn't take much to tip the scale these days. Do you know where your records and information are?"

Kate Walker: Explore the science of influence, and learn how to use the rules of persuasion to excellent effect, and ensure that your organisation utilises dynamic inquiry processes.

Paula J Smith: For me, it would be to create and implement a structured methodology and set of tools to enable not only the RIM professionals, but also their peers in IT – the enterprise architects, the business analysts, the procurement specialists, etc – to deliver not only what the organisation wants but also what it needs!

Matthew Stephenson: To recognise that an organisation's information is a key resource in the same way that money, people and physical resources are, and that its management should be made a priority.

Doug Allen: Implement a standards-based approach in the management of records and information, beginning with ISO 15489. Of course, I would urge that such an approach be extended to the professional development of staff.

iQ: In 1987, when Eddie Shah, owner of Today, Britain's first full-colour daily newspaper, sold it to Rupert Murdoch, he said that newspapers would be put out of business by 2000 by electronic media and pressure

from the environmental movement to cease paper pulp production. Neither of which has been the case.

We often see techniques, processes, innovations or legislation that we think will change the way we do business, or to give us a more professional edge, which, over time, prove to be disappointments or to be quickly outdated. Other advances sneak up on us. Is there one such advance that has particularly disappointed or surprised you over the last decade or two?

Doug Allen: Cloud computing. The challenges regarding retention, disposition, and information security will likely occupy a significant amount of time. Organisations that fail to include RIM considerations in the development of requirements for cloud computing or remotely hosted software-as-a-service (SAAS) applications will likely encounter significant risks in the areas of compliance and e-discovery.

Matthew Stephenson: Goodness, I was only 14 two decades ago. I am amazed by how much the Internet has changed everything. I sent my first email on Friday 15 October 1993, over 16 years ago. I can't imagine how I would cope without email or the Web.

I think (British Prime Minister) Gordon Brown is not far off in his suggestion that having broadband is a human right. Goodness knows how the Internet will change things in the next 16 years!

Kate Walker: For me, the continued lack of recognition for a profession that continues to expand in conjunction with a highly litigious compliance environment, as well as responsibility for applying good records management practices to electronic records residing in the IT department, instead of the records and information department.

Paula J Smith: The advent of EDRMS has disappointed me. It has been perceived as the panacea to all of our recordkeeping problems, yet I still find organisations that have spent a significant amount to implement a system which is fundamentally flawed.

"We will eliminate duplication" says the business case, but the organisation has no version control, has not educated its users on the recordkeeping aspects of the new system, and so the duplication actually increases as 10 versions of the same object are created and 'managed' independently!

Fundamentally, we, as a profession need to better understand these technologies. Don't be afraid to enter the dark world of IT and learn about the systems. But also understand the mindsets of those who implement these technologies, from both a vendor and client perspective.

Irene Gelyk: When I was in college back in the '70s, an instructor told us that we would go 'paperless' within twenty years. I haven't seen that happen yet.

I would say that Google and BlackBerry have revolutionised so much of what and how we do things over the past 5 years, but when you consider that even a year ago Twitter was not even on the radar and how pervasive it has become, I'm not even willing to say what is coming next.

All I know is that I must be prepared for whatever comes next and be ready to rethink, adapt, adopt and tweak my RIM programme.



iQ: What is your tip for an advance, technological or otherwise, that is likely to give RIMs a professional edge in the future? Or, alternatively, what is the advance that you would like to see that offers that professional edge?

Kate Walker: I have a few. Senior executive sponsorship. Best practices leveraged from the physical world. Defined policies for governing enterprise information, and processes defined to manage the information. Constant communication and the use of a shared vocabulary. Recognition that technology is a means, not the end. And I would urge managers to educate, educate and educate again, and to not forget to prove the business value of RIM.

Matthew Stephenson: EDRMS/ECM has not delivered what I hoped it would, and I don't necessarily blame the vendors. In public sector institutions there has not been the appetite to spend hundreds of thousands of pounds on a system whose efficacy is still to be proven.

I would like to see Web 2.0 outfits like Google work together to come up with real cloud information management which is truly scalable and bulletproof.

Irene Gelyk: If you aren't managing the electronic records and information in your organisation yet, who is? The IT departments in most organisations haven't done a very good job of managing information in the past, so unless you partner with them now, it is only going to get worse.

Throwing more servers, 'clouds' and other technological solutions into the equation is only going to complicate matters. Get a handle on your organisation's records and data now. Make it a grass roots initiative within your organisation.

Paula J Smith: Perhaps the RMAA could work with universities and our existing professionals to consider job swaps, secondments, work experience placements, etc.

The variety of roles I have held across my career have helped me to better understand the organisations' context and the why's, how's and what's of recordkeeping.

Doug Allen: Advances that provide RIM professionals with a future edge include the active pursuit of RIM standards within their programmes, and the use of Core Competencies for career development. They are fundamental.

Within the scope of technology, RIM professionals need to make use of tools apt to impact their programmes. Full familiarity

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with cloud computing and its challenges, and personal use of blogs, wikis, and other social media tools allows us to speak with knowledge to peers in IT, legal, compliance, and within an organisation's business units with credibility.

iQ: What else, apart from improved educational training and qualifications, can give a RIM a professional edge?

Matthew Stephenson: We're a bit like agony aunts – we go to people with problems and solve them, and so rather than get all techie, which seems to have been the in vogue thing to do over the past few years, I think we need to go back to basics, as it were, and learn a few people skills, and to remember the simple stuff we take for granted but which makes a difference to many people.

Kate Walker: Change and control your emotional state and that of others. Beliefs determine your success, so develop empowering beliefs and deal with limiting beliefs. Become outcome focused. Create robust business relationships that create deep rapport. Use powerful language patterns to influence and persuade colleagues. Elicit critical information from the people you want to influence.

Doug Allen: Additional efforts that RIM professionals make to upgrade their written and verbal communications skills can be vital to that professional's competitive edge.

Paula J Smith: A very good manager once told me 'perception is reality'. I now better understand what he meant. This is one of our biggest problems as a profession; we are perceived as filing clerks, therefore we are filing clerks. If we want to change that perception, we have to make the change.

We need to become stronger, to be unafraid of saying 'no' to colleagues when they want to buy another 'archiving product', of being prepared to apply the brakes when IT issue an RFP for a system to make us 'compliant with legislation', but also to be flexible enough to bend in the wind.

I would also like to see us publish more, support people with opportunities to conduct research. And use our advocacy role more often.

Irene Gelyk: Become a Certified Records Manager through the Institute of Certified Records Managers (www.icrm.org). Invest in your future by becoming members of ARMA, RMAA, RMS and other related professional organisations.

Learn about the capabilities and traits of the new generation, Gen Z. Here's a quote from Babyboomercaretaker.com that I think says it all:

'For Generation Z, computer technologies and the Internet is the common place. All their communication takes place on the internet and they show very little verbal communication skills. Most of their formative years are being spent on the World Wide Web. They are used to instant action and satisfaction due to internet technology.'

Adapt. Be proactive. Try something new. Make a difference today.

iQ: What plan do you have in place for improving your own professional edge in the future?

Kate Walker: I always strive to be more successful. I focus

on personal and professional development on an annual basis, constantly reviewing my situation to ensure that I have the plans to continue to develop and grow.

I focus on developing leadership, strategic, governance, communication, and training skills in a cohesive manner to share ideas, concepts, and strategies. And I try to overcome my limiting beliefs by boosting my intelligence and creativity, and by increasing my personal effectiveness and developing an onslaught of ideas.

Above all, I strive to truly understand, visualise and achieve my goals.

Paula J Smith: There are a number of things that I need to work on, some of them are specific to the RIM field where I need to improve my skills and knowledge in the archiving space, and improve my technical skills so that I can better advise on Web 2.0 tools and their application.

But there are also softer skills. It will come as a surprise to many who know me, but I am something of a control freak at times. I need to get better balance in my life, allowing others to do what they are good at, and not try to do everything myself!

Professional edge is not only about having the knowledge and skillset, it is also about being able to deliver when needed, and with interests across the board, not to mention being very purple. I need to work on that aspect of myself as well.

Matthew Stephenson: I plan to keep engaged with professional networks, which will improve my own professional edge, and to make sure that that edge keeps moving forwards.

Irene Gelyk: My plan is to invest in myself and my profession. I recommend that colleagues learn and enhance their leadership skills by becoming active board members within their local, regional and national organisations.

We should all be doing the best we can through continuously learning, sharing, networking and adaptation. Give back to the RIM community. You can make a difference, globally, by supporting the development and distribution of RIM educational training materials for helping developing national governments introduce new strategies for managing public sector records. Visit the International Records Management trust website today to learn more, at www.irmt.org.

I think we all need to remember, as the old proverb says, that life is precious, so spend it wisely. At the end of the day it is not what we do but who we are. What do we want others to remember us for? Remember to laugh, love and live life to the fullest.

Doug Allen: My professional edge improvement plans will come after I complete my term, first as president, then as chairperson of ARMA International. While I have given some thought to pursuing additional RIM related certifications through our higher education coursework, I have not yet fully mapped out my own professional development programme.

Records and information managers are working through an exceptionally challenging and exciting time. Now that we sit 'at the table' as decisions are being made, we need to fully prepare ourselves with the knowledge we need and must be prepared to articulate specific issues that must be considered as our organisations move forward. **iQ**