



Chapter 1: Prepare for MADness

A MAD event is going to be disruptive to records and information management (RIM). It can mean dealing with unfamiliar and often incomplete records, retention schedules and management practices. If RIM isn't included in the early stages of the deal, it can lead to bigger challenges later. Here's a checklist of things to do BEFORE a merger, acquisition or divestiture.

PRE-MAD CHECKLIST

- Make RIM a line item**
Estimate the cost to integrate or eliminate both physical and electronic records and include it in the acquisition budget.
- Plan ahead**
Determine how programs will be merged or altered and prepare a project plan including staff, resources and policy.
- Take inventory**
If possible, gather key RIM information from the organization to be acquired/divested:
 - > Volume of records
 - > Off-site storage vendors
 - > RIM program policy and org chart
 - > Records retention schedule
 - > Outstanding legal holds
 - > RIM software apps
 - > RIM program metrics/history
- Lighten the load**
Look more closely at what you can destroy before the final transaction to reduce the volume of records to be moved later.
- Assemble a team**
Assemble stakeholders from all organizations to manage the change and share accountability.
- Get it in writing**
Document all decisions and actions so you and management have a record of the plan and the progress.

Chapter 2: Prep to Minimize Risk >>>