Eliminating the Blame Game: Creating your Company Strategy for Documented Defense
Welcome

**Presenter:** Wesley Ballance  
Sales Engineer  
Viewpoint Construction Software

Wesley Ballance is a sales engineer with Viewpoint Construction Software and is an Association of Imaging and Information Management (AIIM) certified Enterprise Content Management and Business Process management Practitioner. Wesley has subject matter expertise in the software functionality of construction content management and workflow solutions.

**Presenter:** Todd Jones  
Partner  
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TODD A. JONES is licensed in North Carolina and the District of Columbia. The firm focuses on construction law and litigation, contract law, labor and employment issues, and lien and bond claims related to construction, environmental, and real estate development litigation. Todd earned a BS in Public Health at the University of North Carolina at Chapel Hill, and received a JD from Campbell University’s Norman Adrian Wiggins School of Law in Buies Creek, NC. Todd frequently speaks at national trade conferences and has published several articles on the topic of construction litigation. He is very active in bar and contractor associations.
Webinar Highlights

Will discuss:

1. How to Protect Your Important Business Record Assets
2. How to Create a Litigation Readiness Plan
3. The Power that a Content Management System can provide to execute your Readiness Plan
Excuses! Delays! How can contractors think they can get away with this?

...because they know how to build stuff and you don't.
The Blame Game: What it Results In

- Project Delays
- Inspection Fails
- Communication Gaps
- Profit Fade
A Basic Strategy

“According to the September/October 2013 CFMA Building Profits magazine article, *Reducing ESI Costs: Strategic Advice for Construction Litigation*, “Electronically Stored Information (ESI) is typically scattered throughout many employees’ (custodians) inbox/sent folders and may be contained on central servers or even more problematic, reside solely on the involved custodians’ desktop.”
A Basic Strategy

1. You need a way to file and organize EVERY document and correspondence related to a project in ONE location.
A Basic Strategy

2. You need to define your organizational taxonomies. The Office doesn’t always think the same way as the field.
A Basic Strategy

3. You need a method or better yet a system for information search and access.

Methods for Search:

- Search by File Name
- Search by Word or Phrase
- Search by Project
- Search by Document Type
A Basic Strategy


Methods for Distribution:

- Provide External Access to Internal ECM Systems
- Copy Information to Media (CD, External Drive, etc. with parameters for search)
- Copy by Linking to internal location
- Copy by Email (only effective with smaller sets of content)
A Basic Strategy

3. You need an internal records retention policy.

- The Federal Rules of Civil Procedure (FRCP) state that parties are to discuss preservation at the “meet and confer,” but in practice, preservation decisions should be made long before.
A Basic Strategy

According to the Association of Imaging and Information Management (AIIM), there are 8 Major things to consider when developing a Retention Policy:

1. Understand the Need for a Formalized Retention Policy
2. Know what standards are under the FRCP
3. Identify which document types should be reflected in you policy
4. Know all of the local, state, and federal regulations
5. A company’s retention policy is only as Effective as its implementation
6. Regular Enforcement is Key
7. A Properly executed Retention Policy can serve as a roadmap
8. Take Inventory of your backup media and Insure that proper archiving and preservation methods are in place.
The Power of an ECM Solution

- Electronic Search VS. Manual Information Gathering
- Eliminates the need for storing hard copy files
- Search
- Search
- Search
- And SEARCH

Did I mention search??
Traditional Communication

Scanning / Email
Paper Forms
ERP

OCR / ICR
eForms
ERP

ECM

ERP

3
Traditional File Management

Project Lifecycle: Phase A, Phase B, Phase C, Phase n...

ERP

Scanning / Email

Paper Forms

ERP

OCR / ICR

eForms

ECM

Project Lifecycle: Phase A, Phase B, Phase C, Phase n...

ECM

ERP
The Power of an ECM Solution

Search and Access Features:

• Index Search
• Full Text (Search by Word or Phrase)
• Reports
• Transactions
• Desktop
• Web

• Images Linked to LOBs
• SharePoint
• Outlook
• Office
• Distributed Search (Search Features available to External Parties)
The Power of an ECM Solution

A Preview of ECM
Questions
About Viewpoint Construction Software

Viewpoint Construction Software has translated over 35 years of intense focus and collaboration within the construction industry into a rock-solid software platform that helps construction professionals efficiently manage all areas of finance and operations.

About Anderson Jones

Anderson Jones, PLLC is a Raleigh, NC-based firm that focuses on a variety of practice areas, and each attorney possesses a wide range of experiences and backgrounds which are suited to accomplish the goals and needs of our clients. Our firm handles legal matters in the following practice areas: Construction Law, Construction Litigation, Collections, OSHA Defense, Contracts, Local Government and Municipal Law, Administrative Law, Administrative Litigation, Real Estate, Employment Law, Immigration Law, Criminal Law, Family Law and Traffic Violations.
Thanks!

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