



# What we wish we'd known:

Lessons learned from an EDRMS journey

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March 27, 2026

# Introductions: Magic style!



**Rachel Wilson**  
Manager of Privacy and Information

County of Wellington

- Population: 109,000
- EDRMS System: SharoPoint Online
- Number of Users: 1,200

2024 EDRMS Masters



**Shawn Anandakumar**  
IM Supervisor

County of Wellington

- Population: 109,000
- EDRMS System: SharoPoint Online
- Number of Users: 1,200

2024 EDRMS Masters



**Alison Gray**  
Director of Corporate Services / Clerk

Township of Severn

- Population: 14,576
- EDRMS System: Laserfiche
- Number of Users: 62

2024 EDRMS Masters



**Justin Grainger**  
Deputy Clerk

Town of Erin

- Population: 15,000
- EDRMS System: "Getting started" with SharePoint
- Number of Users: 160

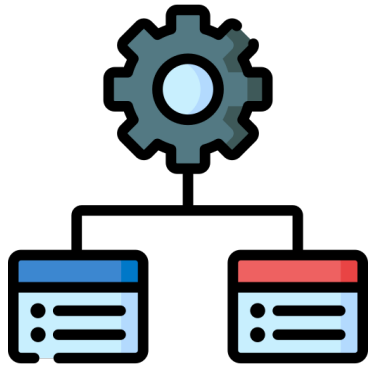
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# Agenda

- What is an EDRMS?
- Lessons Learned:
  - Preparation
  - Pre-implementation
  - Implementation
  - Post-implementation
- Demos

# What is an EDRMS?

Electronic document and records management system that helps:



Organize



Classify



Dispose



Comply

# Preparation

Executive  
Leadership  
Support

RIM & IT  
Partnership

Update  
Policies &  
Procedures

Shop the  
Market

Gather Data &  
Determine  
Measurables

# Pre-Implementation

Redundant,  
Outdated, Trivial  
(ROT)

Empower leaders  
to increase buy-in  
among staff

Permissions  
Strategy

Learn key  
business  
processes

What's in it for  
me?

Change Management  
Plan  
Communication  
Strategy

## ADKAR

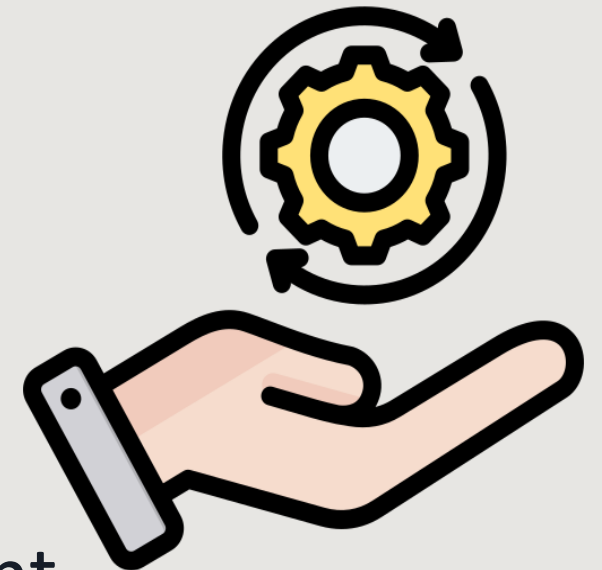
Awareness

Desire

Knowledge

Ability

Reinforcement



# Implementation

In-house  
training

Maintain  
Engagement

Beware:  
Customizations

Prevent Old  
Habits



# Post-Implementation



The garden is planted, now tend to it.

Explore  
Integration

Record  
Destruction

Conduct  
Audits

Future process  
improvement



Demo

**Lasertifische<sup>®</sup>**

# Demo





# ARMA Ontario InfoConnect<sub>2026</sub>

**Compliance to Confidence:** Information in an Era of Risk

May 7 & 8, 2026 at Delta Waterloo

