

Information Systems Consulting Series

125-104

Implementing your online collaboration strategy

We work in a Web World for business outcomes

Introduction



Good morning, ladies and gentlemen. My name is Micheal Axelsen, and this presentation focuses on providing a practical guide to the implementation of your online collaboration strategy, with some useful tips and thoughts on how to proceed with the implementation of collaboration technologies, including blogs and wikis, into the business.

This presentation is focussed upon:

- Business
- Collaboration technologies
- How to succeed with their implementation

At all times, though, this is intended to be a practical look at the application of these technologies, and addressing the practical concerns of business.

You will see here our agenda for this morning's presentation. In many ways, the presentation is asking you to think of these tools, and your approach, as part of a portfolio of mechanisms from which you can draw those mechanisms that are right for you.

Firstly, we take a quick look at blogs and wikis and how they might be relevant for your business.

Then we think about the business, what you do in your business, and what type of collaboration tools would be appropriate for your business. Not all businesses should use these tools in exactly the same way.

Having identified the 'why', then we can think about 'how'



we go about implementing the technologies with your team, and how we increase the participation rate.

Finally, some points on planning for your implementation and a summary complete this presentation.

As stated, this presentation provides a practical roadmap – a portfolio of approaches and mechanisms to implementing your online strategy.

The approach outlined here covers both externally-facing content (i.e. traditional ‘blogs’) and internally-facing content.

I would also like to impart the message ‘be realistic’ with your online collaboration strategy – and reality has a particularly tangible way of re-imposing itself if we stray from our true purpose in the business.

So who am I? As a Director with BDO Kendalls in Brisbane, I provide systems consulting advice to businesses – growth businesses and corporate businesses. BDO Kendalls is a chartered accounting firm, and as you’d perhaps imagine, very focussed on ensuring business outcomes for clients rather than implementing the latest gadgets and gizmos where there is no real value.

I am also Chair of the ‘Information Technology & Management Centre of Excellence’ for CPA Australia, which looks at over-the-horizon issues and the impact of technology upon business. We are particularly concerned about understanding the impact of technology upon business through things such as telecommuting, work-life balance, and profitability, and there is a lot of potential for wikis and blogs here.

Now let me clarify - I’m not an ‘A-list blogger’. In fact, if blogging were rugby, I’d probably be the Under-14H’s. I do however have my own blog at www.michealaxelsen.com, which I consider to be a professional blog in that it focuses upon happenings relating to the management of information systems. It doesn’t deal with personal issues overly much, and it will rarely, if ever, mention an actual client.

Mostly, this is because, as accountants, confidentiality is what we do.

Purpose

- To provide a practical roadmap to implementing a collaboration strategy using tools such as wikis and blogs for use internally and externally

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About the speaker



- Micheal Axelsen is a Director with BDO Kendalls in Brisbane, advising clients on information systems management issues.
- Micheal is a CPA, and is Chair of the Information Technology & Management Centre of Excellence for CPA Australia
- Micheal’s blog is www.michealaxelsen.com

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Blogs and wikis

Blogs and wikis

- It's about communication!
- Internal & external communication vehicles
- A project space
- Provides the opportunity for interactive websites – a direct relationship with clients
- Newsletters are old hat – 'From your desk to mine' – cheaper and more effective

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If we think about it, blogs and wikis are something of an extension of the stone age cave wall – 'Hunt Bison here', that sort of thing. Language is the thing that has made mankind different from the remainder of the animal kingdom – we communicate meaning, we communicate to collaborate and hunt down a herd of buffalo, or communicate how to manage a project.

It's all communication.

And blogs and wikis play in that space, that very particular, very effective, space of communication – communicating shared meaning, to communicate project status, announce information, or to discuss and come to a conclusion.

Internally, blogs and wikis provide the ability to communicate and collaborate amongst staff – project spaces, internal communication, reference manuals, and so on.

Externally, there is the opportunity to engage with your clients, to communicate and share your mindset. A blog is quite a bit more permanent than, say, a newsletter, a little more immediate and relevant, and is engaging for your clients to understand.

And of course the barriers to entry for blogging can be very low – recently I presented to the Rotary Club of Brisbane Planetarium who were delighted to realise that the cost of entry into the world of blogging was effectively zero (for the tools, anyway).

These low costs of barrier to entry are, of course, a double-edged sword. There's a lot of discussion about 'New Media', vodcasts, vlogging, and so on. Rather than have an editor in Channel 7 news filter out the news so we see it all in about 12 minutes each night, we can go direct to the source.

Recall the Hurricane Katrina data security centre in New Orleans that blogged throughout the natural disaster and was for a time the only 'unfiltered' news publishing team at that time.

Of course it's not all good news:

- it's too easy in a blog to write an off-the-cuff comment that gets misinterpreted
- A blogging employee could cause you considerable grief
- Best tip I've heard of to see how your company is

Blogs and wikis



- Impact of 'New Media' and vlogging
- All the issues of 'old media' – defamation and your employees, think-before-you-type
- Not all good news:
 - Employee blogging policy
 - Blogging and job security
 - Search 'my company name' and 'blog'

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faring in the blogosphere? Type ‘your company name’ and ‘blog’ – it’ll be interesting to see what the blogosphere says about you.

Your business context

Your business context - Strategy

- Your collaboration strategy will identify:
 - The potential benefits of blogging – the ‘why’
 - Understand the type of business you are, and your appetite for risk, and available resources
 - Communications plan to build awareness
 - Identify the type of blogging that is most appropriate to your business
 - Processes to manage change

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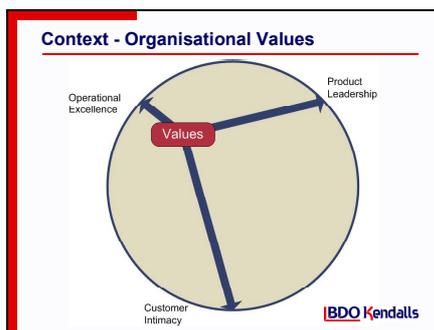
Now, given that you are attending a two-day seminar on ‘Blogs, wikis & RSS’, you are likely to want to rush straight out and get yourself a blog. Most people do – it’s a natural reaction.

Before you do, I suggest: ‘Blogger, know thyself’. I can tell you very easily *how* to set up a blog, but you need to understand the ‘what’ and the ‘why’. ‘What’ would happen if you didn’t do the blog, and ‘why’ you can convince others to spend time writing a blog.

Identify your strategy, the context of your collaboration strategy. What is your goal? Understand your business, what the expectations are, and how to go about it.

Not least of all, implementing your blog and wiki is about change. Let’s consider the implications a little more.

Each organisation is dominated by a particular value over another. There are three core values a business can operate under:



- Operational Excellence – ‘We do what we do very well, we’re the cheapest, most efficient, provider on the market’
- Product Leadership – ‘We lead the world in providing these innovative services through building new products and new services to address new problems’
- Customer Intimacy – ‘We are nothing without our customer relationships’

One value will dominate (not to the exclusion of all others), and if you understand the kind of organisation you are, it will quickly lead you to an understanding of the type of collaboration strategy that will suit you best.

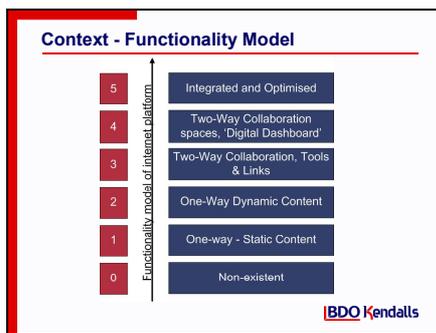
For instance, a business that is focussed on operational excellence will perhaps focus on using a wiki as its reference manual, updating and learning over time how to achieve your outcomes and capturing that. A transaction processing department, a manufacturing organisation that has few key customers, would be examples.

A customer-intimate business looks to the relationship with its clients, so an external blog that is emphasised at all points along the way in discussions with clients provides

that point of intimacy with the client, that feeling that you and I – we click, we understand each other. BDO Kendalls is an example of a customer-intimate organisation – sure, technically we’re very good, but there’s no point in us being really good if clients don’t like us. For us, it is appropriate to consider externally-facing blogs, and to put a lot of effort into that approach.

Finally, for the product leadership organisation, it is exceptionally important that our people collaborate and coordinate to develop and innovate their products and services. For a business that is the best in the world at innovating and creating new products – internal blogs and wikis that share information and ideas, and project spaces that emphasise this, will be the focus.

This is of course an over-simplification, but I am asking you to think about the type of business you are and not to ‘blog a dead horse’ (pardon the pun).



Having identified the type of organisation you are, the next part of the puzzle is understanding what is appropriate for you. This model is simply meant to indicate a hierarchy of internet functionality. It ranges from 0 – no internet, nothing, this thing is never going to take off – to 5 – is it possible to even deliver services without the internet?

The hierarchy increases in the availability of collaboration tools on its way to that ‘integrated and optimised’ level 5 nirvana.

Most businesses are somewhere in the middle, probably a level 2 approach with one-way dynamic context. Again, think about where your business is, what your client base and internal stakeholders expect, and what type of organisation you are.



If the business is risk-averse, then there won’t be any kudos for spending lots of money on what may be considered to be a ‘Gen Y’ gadget.

Understand the resources you have available – can you ‘bet the farm’ on your blog and wiki or – more likely – do you have only a small budget?

You should note of course that in my view technology costs should be minimal for any blogging or wiki strategy – expenditure will be on promotion and awareness campaigns, and of course time to maintain the blog or wiki.

What is the relevant approach and focus of these collaboration tools? Match the purpose of the blog or wiki tool to your organisational values.

Even a ‘free’ resource can be a considerable cost in terms of senior management distraction. Be wary of that usage of valuable time, and ask yourself ‘no, really, will we do this properly?’. Have the communications plan all set out and have the support ready for your corporate bloggers as required.

And when the inevitable question comes, be able to answer that most insidious of questions, ‘Why?’. Have a clear purpose, and know what ‘success’ means

Setting up your team and your approach

Setting up your team and your approach

- Demanded from the business
- Create a project team, manage as a project
- Identify collaboration strategy
- Have a realistic approach that achieves
- Change management strategy

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All of this means that you must know your business, your market, your risk appetite, and your purpose for the blog or wiki before implementing your online collaboration strategy.

Let’s take a look at the portfolio of mechanisms available to you in implementing your online collaboration strategy.

There are four key considerations in implementing your online strategy:

- The business is demanding it
- Manage it as a project – not as a mere piece of hyper-fluffery
- Be realistic in your aims

Manage the consequences of change
The following are mechanisms that you will need to bring together into your project team – there isn’t ‘one best way’ or even a set agenda that you can follow. But there are some important key principles, which are outlined, and some tools you can use in your implementation process.

Approach – Focus on the business

- Firstly, this is a line business issue – the demand needs to come from the business, not IT
- Educate so that business embraces the concept and wants it, or drop the project
- Driven by the business!

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Technology is an enabler. The business of doing business is business. The business must want this. Crave this. Desire, love, and kill for this. If line business does not see a need, then consider this:

- The line business people will be intimately involved in its success or failure
- The line business people may not be aware of the potential yet – so awareness may be key
- The line business people may actually be right – there may be no place for blogging or wikis in the business.

If the business is not demanding it then maybe there are better projects to spend your time on.

Approach – The team

- Internally-facing collaboration strategies will be different to, but complemented by, externally-facing collaboration strategies
- Every team will be different
- The team needs stakeholders across the business, with some technical support

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A project team is necessary – although how formally this is set out will be dependent upon the type of organisation. However, clearly the project team should be able to make decisions and act upon them. Identifying a project charter can be a good idea, especially where the project charter can be outlined in a pithy fashion.

Also the project team that is put together for an internally-focussed collaborative wiki and blog, rather than a promotional external blog, will vary between businesses.

Consider though the role of:

- Marketing and brand management
- Corporate Communications
- Domain experts
- ‘Crucial Communicators’
- IT Technical
- Legal
- ‘Content Coordinators’

As with all projects you will need to identify your stakeholders across the business, and bring them with you on the collaboration journey.

Approach – Collaboration strategy

- Define your strategy and approach
 - Mission
 - 3-year goals
 - 1-year initiatives
 - Quarterly project deliverables
 - Measure and Feedback
- Celebrate

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This is a business project, not an idea that you should get hot under the collar about initially and then cool down. The latest research from DCITA shows that businesses that report the most value from IT in their businesses have a strategy and are patient and consistent in their approach to using IT. Patience, and an understanding of your strategic goals, will reward you with a successful collaborative environment online. Impatience and a short attention span will guarantee little results for your efforts.

You should formally write down your collaboration strategy, or plan. Set down a mission, and identify your longer-term goals. Then, working back from that, you identify the initiatives that need to be delivered within one year, and then quarterly project deliverables.

Key to most strategies of course is the ‘measure and manage’ feedback loop, and the collaboration strategy is no different. Know what success looks like, how it is measured, and understand and be able to report whether you are succeeding or not.

And when you know the project is succeeding, celebrate your successes. Too many project teams don’t feel well-rewarded for progress – celebrate in a good old-fashioned

Approach – Be realistic and achieve

- Have short, sharp and defined mini-projects of no more than 90 days duration
- Avoid the search for the perfect technical solution, look for the workable solution, learn, and upgrade
- Measure effectiveness, know 'success' when you see it
- Stop and identify the feedback!

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way (preferably, without technology!).

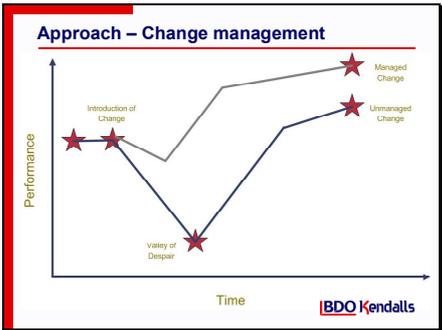
In your approach to this project, be flexible and open to change. It is likely that technologies and business imperatives will change over time, although the general strategic thrust may not. Expect that the broader framework (goals, perhaps initiatives) will not change, but perhaps quarterly rocks will need to be fluid.

We recommend short, sharp, and defined ‘mini-projects’ – If a project can’t be met within a three-month timeframe, break it into two separate milestones, or consider instead whether this mini-project is necessary. A mini-project that takes longer than three months risks never completing. In this vein as well, consider that it is likely that technologies will evolve and change, and that a search for the ‘perfect’ solution will be fruitless. Instead, find the workable solution, learn lessons, and change technologies or adapt.

In the face of this, be patient, persistent, and positive, and prepared to change platforms, tactics, and to generally learn from the experience.

Understand the critical numbers that drive your success in the collaboration strategy, and be able to measure these numbers. Know success when you see it, and regularly stop and obtain feedback during the project implementation phase (and be prepared to act upon that feedback).

Interestingly in this new world, failure is actually an option. Failure without learning a lesson, though, is a failure of the worst kind.



Change management is about communication, and an understanding of the need for change. As part of this, the project should include mini-projects that go towards increasing this understanding.

Educating and influencing your stakeholders, and promoting the tools at every relevant opportunity, is a clear element to a successful implementation of your collaboration strategy.

Increasing the participation rate

Increasing the participation rate

- Keep it easy and support your contributors
- If it's important, then treat it as such – send a message
- Clarify what is required, what is appropriate, and monitor for what isn't
- Promote the blog and wiki

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Your contributors are essential to the success of this strategy. You should ensure that your tools and technology platform make it easy for your contributors to create compelling content, and that your blog is seen as important, and its role as an online exponent of your brand is clear.

Participation – Support and involvement

- Ease of use
- Provide support programs for your authors
- Awareness Campaigns
- Measure and report the value to senior management

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It is likely that your contributors will need some form of support – so workshop support, or mentors, will be a good idea. Other programs may be communication courses in the 'new media' or legal obligations in an online environment.

Initially, at least, it is recommended that the number of blogs and/or wikis that are implemented be minimised. There are good arguments for team-based blogs rather than blogs based around the individual, although then it is too simple for team members to expect 'someone else' to post. And rather like Mr Nobody, 'someone else' rarely does.

Ensure through an awareness campaign – e.g. big colourful posters, email information, and so on – that all staff are aware of the online initiative and can see the link between this online collaboration space and business success.

Finally, senior management should be convinced of the value of the communication tools in place, and whether the blog or wiki is internal, external, or both, some key performance indicators can be enumerated to indicate the ongoing value delivered from the blog.

Participation – Send a message

- Don't reward inaction and punish action - align key performance indicators
- Identify blockages and mitigate or eliminate
- Clearly show the cynics that it's core to the business – if it is in fact core
- Celebrate achieving milestones
- Set the tone at the top

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To make an omelette, it is necessary to break some eggs. Occasionally, your online author is going to get it wrong'. Rather than punishing action and rewarding inaction, aim to align key performance indicators. This can be as simple as a key performance indicator around the number of developed content pieces provided to the blog or wiki.

Although it sounds simplistic, most current HR performance measurement systems are at least ambivalent about such contributions, and in fact most are downright hostile. For example, in an accounting firm, 'knowledge is power'. There is usually considerable resistance to 'experts' sharing their expertise in a collaborative way. For them, it is all downside with no upside. If they publish, for instance, tax interpretation advice to the

intranet, there is the risk that other parties within the firm will use it with their clients. At worst, this opens up the expert to legal action if the advice is not appropriate (a risk for which they were not paid!) and at best the expert considers that they have ‘missed out’ on a fee.

The tone comes from the top, and having an internal blog written by your CEO or managing director that is articulate and relevant will send a message about the importance of participation in such a program.

A word of warning, of course, is that creating several blogs that have three entries and then no posts sends exactly the wrong kind of message. The Telstra example with the blogs of its senior managers, and the Courier Mail in Brisbane’s wholesale adoption of inactive blogs, show the pitfalls of adopting a collaboration strategy that is disconnected with the core part of the business.

An employee blogging policy is a ‘must-have’ in today’s environment. There is of course a distinction in this area, based upon the intended role of the blog, between:

Participation – Set boundaries

- Identify a blogging protocol or policy and differentiate between:
 - Personal blogs
 - Corporate blogs
 - Professional blogs
 - Internal blogs
- ‘First, Do No Harm’, but recognise that sometimes the scalpel will slip

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- Personal blogs – a blog you maintain about your own personal life, with the business only peripherally rating a mention
- Corporate blogs – a blog sponsored by the business and representing its ‘corporate face’ in the blogosphere
- Professional blogs – a personal blog that is acknowledged by the business, but revolves around a niche topic of expertise and **never** mentions client names or commercial activities.
- Internal blogs – a blog that is only ever seen by internal staff members only.

I would consider my own blog a ‘professional’ blog in this context.

The blogging policy should differentiate between these types of blogs, at a minimum, and commensurate with the business’ risk appetite clearly set out what is appropriate in a blog. Of course, for any large companies some staff members will currently have a blog – for your own business effectiveness, the blogging policy will ensure that risk relating to this is mitigated. For example, terminating an employee due to their blogging actions is likely to be expensive, and at the very least a distraction to the business.

Participation – Promotion and stickiness

- Celebrate the blog everywhere you go!
- Newsfeeds on intranet home page
- Encourage debate amongst readers
- Honesty, transparency and frequency
- Allow time to work its magic
- Polls and Surveys

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Celebrate the blog! The blog should be promoted, and have strong, valuable and relevant content. A strong blog promotes debate, is transparent, and is regularly updated. A blog will take some time to make its presence felt.

Some blogs regularly publish dissenting points of view as a post, upgrading a comment from a reader to a post of its own to give it appropriate prominence on the website. Even if you don't agree with what they are saying, that appearance of honesty and transparency is valued by the reader community.

In the business, of course, the blog should equate to the death of the monthly newsletter, and it's more participative and measurable.

By way of example, it is noted that Brian Haverty of ZDNet has introduced quick email polls into his weekly email newsletter – a blog can do much the same. It encourages a debate and communication between reader and author, and its immediate and sustained.

Having identified the blogging policy and publishing guidelines, it is essential that the immediacy of a blog – that one-on-one feeling of communication between blogger and audience – is not violated. Thus, it is best to have your communications or marketing people monitor the officially sanctioned blogs through RSS, but they should not act as a gatekeeper to content. Occasionally there will be slipups, but these should be valued as learning experiences rather than used to punish the perpetrators.

Rather than the saccharine polish of an overly indulgent newsletter, an online blog can create stickiness with the audience and create a sense of belief in your business' brand.

Implementation Roadmap

Implementation Roadmap – Strategy

- Strategy to a page:
 - Mission
 - 3 Year Goals
 - Initiatives
 - Mini-Projects
 - Measure and Feedback

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So, to bring this all together into a roadmap, like most such things it is important to identify the strategy.

In a single page, it is necessary to identify the mission, our goals three years from now, initiatives that are necessary, and mini-projects for each quarter.

We recommend no more than ten mini-projects each quarter, although that's somewhat arbitrary and can be violated at a whim. The aim here though is to identify a digestible plan that can be accommodated within the schedules of otherwise-busy members of staff. The assumption in this context is that no dedicated staff members will be provided for this project.

At each step along the way, even inside the 90-day mini-projects, measurement of the audience, the contributors, and the wider staff community is recommended so that the collaboration strategy can be reviewed and adapted as necessary.

Implementation Roadmap - Tasks

- Identify project team
- Assess the business need
- Define collaboration strategy
- Communication plan
- Identify 'crucial communicators'
- Blogging policies

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The project team must be identified, addressing stakeholder needs, and the organisational values (operational excellence, product leadership, and customer intimacy) need to be understood.

The business need must be assessed and identified as an opportunity by the line business. The emphasis cannot be made strongly enough – the business must look upon this project with unbridled lust for its outcomes. If the business is not interested, then consider the awful possibility that they may be right – that blogging and wikis are not tools that are appropriate for your business – or that education and awareness is required at this time before embarking on a collaboration strategy with a high risk of failure.

'Crucial Commentators', or champions, for this program must be identified early and lead and mentor the rest of the business into understanding the role of these collaborative tools and their value.

A communication plan and blogging policies are two further documents that should be considered and addressed by the project team.

Implementation Roadmap - Tasks

- Implement performance measurement and KPIs
- Address cultural blockages
- Small-scale implementation, measure, and modify
- Evaluate and set out next steps
- Rollout larger implementations

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The performance measurement system will need to be aligned with the online collaboration strategy. There is no point expecting X when only Y is rewarded (and when X is actually punished, there is a considerable disconnect between the goals of the business and the incentives of the performance management system.

In this process, cultural blockages will slowly, but surely, begin to disintegrate over the long haul.

As a philosophical approach, a small scale implementation of the online collaboration strategy, with a very quick feedback from the user coalface to the ardent bloggers, is necessary. This allows the plan to be iteratively developed and changed whilst responding to the feedback received.

As each horizon advances, the next steps – the next lot of quarterly mini-projects – are identified, and so from the initial pilot of the collaboration strategy and the supporting tools, increasingly larger implementations are developed for the collaboration strategy. It's incremental, and proves itself before going to the next stage.

Conclusion

Final points – Some thoughts

- Blogs and wikis are still new to corporate Australia
- Time is of the essence
- Customer intimacy - external blogs
- Operational excellence – internal wikis, internal blogs and vlogs
- Product leadership – internal klogs, and wikis

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As a final point, it is noted that blogs and wikis are still fairly new to corporate Australia. The exact corporate role remains undetermined, but significant promise nevertheless exists that these tools are here to stay (although perhaps in a modified version in the future).

Carpe diem – time is of the essence in implementing a collaboration strategy. Your organisational values, risk appetite, and appropriate internet and intranet functionality will determine your approach to online collaboration.

There is an opportunity for innovative businesses to 'enter the blogosphere' as an important component (but certainly not the only component) of their online collaboration strategy.

Having identified this journey, it is relevant to note that your initial analysis indicates that these collaboration tools are not for your business – the business is not ready for this strategy, or simply does not need it.

All businesses are encouraged, however, to consider the implementation of a separate blogging policy that clearly sets out guidelines for personal and professional bloggers on staff. It is possible that this alone will save a considerable amount of distraction away from the main game of being an effective business and into staff disputes

Final points – Some thoughts

- It may be appropriate to 'do nothing' but if so, then at least set out policies on corporate blogging for the personal bloggers on staff
- If you're not prepared to fail, you're not prepared to succeed

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Questions and conclusion

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over online content.

Experimentation is to be encouraged, and failure is an option where a valuable lesson can be learned.

In summary, this presentation has presented some tools to add to your portfolio for the implementation of your online collaboration strategy. The strategy adopted must be right for your business, and appropriate for your risk appetite.

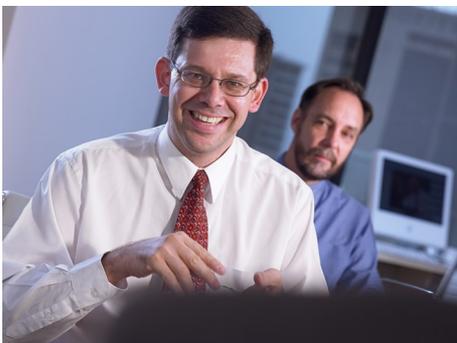
For organisations where the business managers are not already stridently demanding blog and wiki capability, consider especially the disheartening prospect that they are right, that blogs and wikis may not be relevant to the business. Failing this, of course, education and awareness may be necessary.

This presentation is to be posted at my blog (part of that shameless promotion and 'celebration of the blog').

Thank you for listening.

This presentation was made at the RSS, Blogs, and Wikis forum promoted by Key Forums on 29th August 2006.

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Micheal's passion is for assisting corporate, government, and SME organisations (including non-profits) to better manage their information systems for business growth.

Micheal has extensive expertise in the evaluation and assessment of information system projects for large businesses and government agencies in line with business strategies, goals, and objectives and is our technical expert in the area of information governance, particularly with respect to the legislative requirements of government in the maintenance and development of information retrieval systems and record