

Interview and Information Management System



The Problem

The forward motion of any project relies on the efficient collection and organization of information. Progress can stall, however, for a number of reasons—unclear requests for information, misplaced documents, or poorly organized files.

Any professional services firm that works on a project-by-project basis—such as legal cases or consulting engagements—needs a method for requesting and organizing information. They also need to maintain an audit trail by tracking outstanding requests and response times.

The Solution

No off-the-shelf software supported the collection and organization of information, so we developed the Information and Interview Management System (I²MS). One program tracks interviews and information flows for every active project in your firm, listed in the main menu, shown in *Figure 1*.



Figure 1—From the main menu, users move quickly to the right project.

As consultants, we know that there are two primary information sources: documents such as organizational charts or financial reports, and clients themselves, who share their knowledge during interviews. We designed I²MS to support the collection and organization of both kinds of information. I²MS easily performs a variety of important tasks:

- ◆ **Creates an orderly information collection process**—When you request information over the

phone, can you always be sure the client understood you? With the information request form shown in *Figure 2*, which you fill out and send to the client, there can be no mistake about what documents you want. Interviews are arranged the same way, using the form shown in *Figure 3*.

The forms track when you make a request, what you request, and when—or if—the client responds. This makes it easy to identify and address response-time lags before they become problems. Stored in the database, information can be retrieved by the same terms you enter into the form, such as the client's name and the type of information requested.

With standardized forms for requesting interviews and information, two of the most fundamental project tasks move along smoothly. Consultants can easily document the work they've done to gather information.

- ◆ **Works with calendaring software**—I²MS integrates with calendaring software, both desktop and Web-based. When an appointment is made, the system sends an email message to each person involved and places the meeting on their calendars. Everyone stays on schedule without duplicating the same information.

- ◆ **Organizes document filing and retrieval**—Even with the shortest engagements, a large body of printed documents builds up in no time. I²MS has a built-in cross-referencing system between

Figure 2—Standardized forms create a document trail for all information requested.

the database and paper files that serves as a basis for organizing and finding documents.

I²MS numbers each request form sequentially and prints labels listing the project name, request number, and the information requested. When the document arrives, it's filed by the number of the form on which it was requested.

To find a document you need only search the database with a descriptive term, such as "employee count." The result brings up the file number, and you just go to look it up. Misfiled information becomes a thing of the past.

- ◆ **Helps manage the flow of information**—Information from the request forms flows to reports that give managers instant summaries of where a project stands.

Figure 3—All details of a meeting are listed on a standard form; everyone involved is working with the same information, minimizing mistakes.

As Figure 4 shows, I²MS offers a selection of reports that break down information in meaningful ways, such as listing all requests made by each consultant and tracking client turn-around times for providing information or meeting for interviews.

With the reports, managers can spot problem areas and deal with them promptly, so that the project doesn't stall.

- ◆ **Offers Web capability**—All I²MS functions can be made available on the Web, eliminating the need for consultants and clients to send forms back and forth. Both can post and respond to information and interview requests online.

I²MS has been built in Access 2000 and contains more than 30 tables, 50 queries, 20 forms, 30 reports and more than 20,000 lines of VBA code.

The Result

I²MS provides more than just standardized forms for requesting information and interviews. It establishes the foundation for a methodical approach to gathering, filing, retrieving, and tracking critical information.

Clients are impressed by a process that improves communication and minimizes opportunities for error. Your company comes across as professional and organized, earning the client's confidence. Most importantly, the time you save on administrative duties goes into the work, giving the client the greatest benefit of your expertise.

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- Listing - By Consultant
- Listing - By Work Plan Area
- Listing - By Company Reference Number
- Listing - By Search Word
- Information Turnaround Summary
- Label - By Request Number

Description:

Figure 4—A variety of reports tell managers how information is flowing, a key part of keeping projects on track. And labels help organize printed documents.

