



# RECORDS MANAGEMENT NEUROSCIENCE

From Practical Policies and  
Procedures to Primates,  
Pachyderms, and Playful  
Perceptive People

Dylan Williams, CRM, IGP

ARMA Triangle  
Chapter  
April 19, 2018

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## CHALLENGES

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HABITS ARE **HARD** TO CHANGE

**Hoarding**

*Apathy*

**RESISTANCE**

**Duplication**

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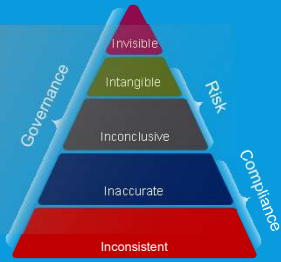
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## UNCERTAINTY

- Protect / Respond / Discern
- 1oz of Prevention...
- Effort ≠ Impact



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## RESEARCH

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## SWITCH

### Prefrontal Cortex (PFC)



**Logical Thinking**  
ST memory (Dorsolateral)  
Focus (Left ventrolateral)  
Inhibition (Right ventrolateral)  
Decisions (Medial)

40 Bits per Second

### Limbic System



**Emotional Feeling**  
LT memory (Hippocampus)  
Process Emotions (Amygdala)  
Patterns (Basal ganglia)  
Pain / Stress (Meninges, Insula)

11,000,000 Bits per Second

*Switch: How to Change Things When Change is Hard (Heath, C. and Heath, D., 2010)*

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# THE PATH



## Connections

- Sensory processing
- Reward center (Orbitofrontal cortex)
- Conflicts and bias (Anterior cingulate cortex)
- Cognition and emotion
- Self-relevance (Ventromedial PFC)

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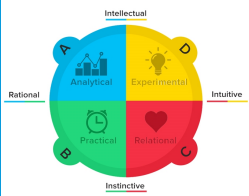
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# PROFESSIONAL MINDFULNESS



<b>Upper Left</b> <b>Finance:</b> Financial Manager, Banker, Stock Exchange Trader <b>Geography:</b> Geographic Information, CAD Drafter <b>IT:</b> Networking Technician, Systems Analyst <b>Medicine:</b> Veterinarian, Surgeon, Doctor, Cyberneticist, Physiotherapist, Rehabilitation Therapist <b>Law:</b> Lawyer, Judge, Notary Public <b>Insurance:</b> Insurance Broker <b>Administration:</b> Assistant General Manager, Office Clerk <b>Accounting:</b> CPA, Bookkeeper, Organizational Manager, Accountant <b>Governmental:</b> Tax Auditor, Administrator, OSHA Inspector	<b>Engineering:</b> Accountant, Bioethicist, Information Scientist, Oil Data Processing <b>Aviation:</b> Test Pilot, Pilot, Air Traffic Controller <b>Research, Biology, Chemistry, Physics:</b> <b>Analysis:</b> Analyst, Engineer, Scientist <b>Analysis is logical, is critical, is realistic:</b> Knowledge engineer, Systems Engineer, Quantitative Analysts <b>Tasks performed under established procedures:</b> Set, Design, Store, Plan, Organize, Implement, Monitor, Study <b>Highly organized, systematic, sequential, logical, and orderly</b>	<b>Upper Right</b> <b>Design:</b> Architect, Designer, Designer, Information Systems Designer <b>Sales:</b> Salesperson, Sales Manager, Real Estate, Medical Rep <b>Creation:</b> Copywriter, Fashion Designer <b>Art:</b> Musician, Sculptor, Musician <b>Advertising:</b> <b>Marketing:</b> Research, Product Manager <b>Film-Making:</b> Director, Editor <b>Journalism:</b> Journalist, Copy Writer, Designer <b>Teaching:</b> Teacher, Laboratory Professor <b>Medical:</b> Professor, Medical Director, Nurse, Midwife, Speech Therapist, Occupational Therapist <b>Trainers:</b> Flight Instructor, Teacher, Coach, Performance Analyst, Training Information, Public Manager <b>Human Resources:</b> Director, Career Counselor, HR Manager <b>Psychologist:</b> Psychologist, Career Counselor <b>Social Workers:</b> Child Social Worker, Counselor, Family Social Worker, Child Welfare
<b>Lower Left</b>	<b>Lower Right</b>	

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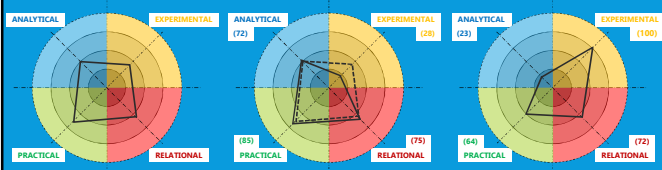
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# SURVEY ANALYSIS



Profile: Record Keeper      Survey Personal      Survey Current Profession

*Whole Brain Business Book, (Herrmann, N. and Herrmann-Nehdi, A., 2015)*

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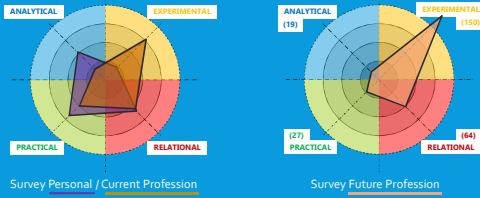
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## SURVEY ANALYSIS



Survey conducted between March 2 and March 10, 2018 via social media and 6 preselected ARMA chapters. n=101

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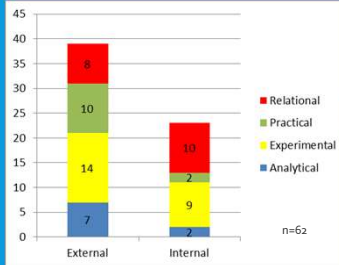
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## SURVEY COMMENTS




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## SOLUTIONS

Neuroplasticity for Experimental, Analytical, and Relational thinking styles

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## RISKY BUSINESS

### Creative Intelligence Competencies

- Knowledge Mining – draw from other disciplines, affirmative inquiry
- Framing – interpret, interact, imagine what-if?
- Playing – change the rules, fail forward
- Making – fast, tangible prototyping
- Pivoting – adapt, push ideas through creation

Technology Assisted Review  
Auto-Classification  
Big Bucket Retention  
Capstone Email Management  
3-Zone Approach  
Risk-Based Destruction  
Data Visualization  
Predictive Analytics

*Creative Intelligence, (Nussbaum, B., 2013)*

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## NET VALUE AND INFORMATION ECONOMICS

### Reward vs. Pain

(Orbitofrontal Cortex vs. Insula)



Laurie Santos: A monkey economy as irrational as ours

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## SOCIAL PRESSURE



Steering Committee



Task Force

“Why” is emotional  
(Amygdala)  
“How” is behavioral  
(Anterior Cingulate Cortex)  
“What” is logical  
(Prefrontal Cortex)

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SUMMARY

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RECORDS MANAGEMENT IS THE PATH



Your organizations are full of monkeys riding elephants.  
Now what?

- Be Mindful of yourself and your consumer
- Experiment, Re-frame, Pivot
- Create Net value understanding
- Leverage Social pressure
- Affect what's HARD and uncertain

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THANK YOU!

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