



# Information Management Review

OST t/a **OST Database Group**

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**Instructions:**

1. Work through only those business areas that are relevant to you.
2. Read each sentence in a given business area. Circle the rating that best reflects your current situation.
3. For each section, add up your tallies, and sum these to determine a grand total.
4. Fill in the Current Status Chart at the end of the Review.

**[1] Supporting Clients**

		Not So Well			Very Well	
		1	2	3	4	5
<b>1</b>	Recording and timely recall of client details.					
<b>2</b>	Recording and timely recall of client case notes.					
<b>3</b>	Recording and timely recall of client evaluations.					
<b>4</b>	Recording and timely recall of support organisations and people linked to individual clients.					
<b>5</b>	Quick recall of client involvement in groups and projects.					
<b>6</b>	Recording and quick recall of emergency contact and medical details.					
<b>Totals:</b>		_____	_____	_____	_____	_____
<b>Grand Total:</b>						

**[2] Managing Groups**

		Not So Well			Very Well	
		1	2	3	4	5
<b>1</b>	Centralised record of groups run and being organised.					
<b>2</b>	Access to details of group members.					
<b>3</b>	Session planning and attendance management.					
<b>4</b>	Access to details of group facilitators and stake holders.					
<b>5</b>	Centralized management of child care and transport needs.					
<b>6</b>	Management of participant details on camps and excursions.					
<b>Totals:</b>		_____	_____	_____	_____	_____
<b>Grand Total:</b>						

<b>[3] Managing Projects</b>		Not So Well			Very Well	
<b>1</b>	Centralised record of projects (centre upgrades, beautification projects, etc).	1	2	3	4	5
<b>2</b>	Quick access to full details of project participants.	1	2	3	4	5
<b>3</b>	Quick access to facilitators and stakeholders.	1	2	3	4	5
<b>4</b>	Project stage planning, overseeing and follow-up.	1	2	3	4	5
<b>5</b>	Basic project stage, task time and cost management.	1	2	3	4	5
<b>6</b>	Centralised management of child care and transport needs.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[4] Managing Associate Contact Details</b>		Not So Well			Very Well	
<b>1</b>	Centralised quick access to associate organisation and personnel details.	1	2	3	4	5
<b>2</b>	Centralised quick access to referrer details for any given client.	1	2	3	4	5
<b>3</b>	Centralised quick access to facilitator and stakeholder details associated with groups and projects.	1	2	3	4	5
<b>4</b>	Ability to search for associates by service types.	1	2	3	4	5
<b>5</b>	Ability to search for associates by preferred service rating.	1	2	3	4	5
<b>6</b>	Ability to quickly record and recall multiple contacts within associate organisations.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[5] Managing Staff Details</b>		Not So Well			Very Well	
<b>1</b>	Centralised records of staff contact details.	1	2	3	4	5
<b>2</b>	Quick recall of staff associated with clients, groups and projects.	1	2	3	4	5
<b>3</b>	Automated linking of staff to individual client case notes.	1	2	3	4	5
<b>4</b>	Management by selected officer(s) of staff incidents, issues and contracts.	1	2	3	4	5
<b>5</b>	Management by selected officer(s) of staff professional development.	1	2	3	4	5
<b>6</b>	Recording and timely recall of staff member's emergency contact details.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[6] Managing Documents</b>		Not So Well			Very Well	
<b>1</b>	Centralised storage of and quick access to client documents.	1	2	3	4	5
<b>2</b>	Centralised storage of and quick access to group documents.	1	2	3	4	5
<b>3</b>	Centralised storage of and quick access to project documents.	1	2	3	4	5
<b>4</b>	Managed storage of and quick access to staff related documents.	1	2	3	4	5
<b>5</b>	Ability to link scanned documents with clients.	1	2	3	4	5
<b>6</b>	Quick link to documents applicable to assets / resources.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[7] Managing Relationships</b>		Not So Well			Very Well	
<b>1</b>	Ability to email one or more clients or contacts at the one time.	1	2	3	4	5
<b>2</b>	Ability to centralise outgoing emails.	1	2	3	4	5
<b>3</b>	Ability to bulk email group or project participants.	1	2	3	4	5
<b>4</b>	Ability to filter clients or contacts for mail merging with external documents.	1	2	3	4	5
<b>5</b>	Ability to copy and paste filtered clients or contact details to a spreadsheet or word processor table.	1	2	3	4	5
<b>6</b>	View emails sent to clients or groups, projects and staff.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[8] Managing Adhoc Contacts, Referrals, Marketing and Brokerage</b>		Not So Well			Very Well	
<b>1</b>	Ability to quickly record and track adhoc contacts.	1	2	3	4	5
<b>2</b>	Ability to quickly record and track referrals in and out.	1	2	3	4	5
<b>3</b>	Ability to quickly record and track marketing materials sent out.	1	2	3	4	5
<b>4</b>	Ability to quickly record and track brokerage provided.	1	2	3	4	5
<b>5</b>	Ability to report on each of these periodically.	1	2	3	4	5
<b>6</b>	Ability to manage categorisation within each of these.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[9] Managing Assets/Resources</b>		Not So Well			Very Well	
<b>1</b>	Record and quickly recall resource details including serial numbers, photos and notes.	1	2	3	4	5
<b>2</b>	Manage asset or resource loans.	1	2	3	4	5
<b>3</b>	Manage asset or resource maintenance.	1	2	3	4	5
<b>4</b>	Track basic resource depreciation.	1	2	3	4	5
<b>5</b>	Manage software licenses and details.	1	2	3	4	5
<b>6</b>	Print resource lists and/ or individual details.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[10] Managing Reminders and Compliance</b>		Not So Well			Very Well	
<b>1</b>	Quickly record reminders for resource loans and maintenance.	1	2	3	4	5
<b>2</b>	Quickly record reminders for staff obligations. Eg blue card renewals.	1	2	3	4	5
<b>3</b>	Quickly record reminders for clients, groups and projects.	1	2	3	4	5
<b>4</b>	Present compliance reminders by staff member at the start of the day.	1	2	3	4	5
<b>5</b>	Manage open and completed tasks and reminders.	1	2	3	4	5
<b>6</b>	Print reminder lists.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

<b>[11] Periodic Statistical Reporting (including PPR's)</b>		Not So Well			Very Well	
<b>1</b>	Ability to collate monthly and/or quarterly statistics for PPR reports in a timely manner.	1	2	3	4	5
<b>2</b>	Ability to collate adhoc contact, client and group data by service or program.	1	2	3	4	5
<b>3</b>	Ability to prepare statistics that provide a view of service activity by age, gender, cultural back ground, etc.	1	2	3	4	5
<b>4</b>	Ability to prepare statistics that provide a view of service activity by issue type.	1	2	3	4	5
<b>5</b>	Ability to prepare statistics that provide a view of group and project activity.	1	2	3	4	5
<b>6</b>	Ability to train staff to effectively record statistics applicable to data.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

**[12] Managing Surveys**

		Not So Well			Very Well	
		1	2	3	4	5
<b>1</b>	Ability to electronically generate client surveys.	1	2	3	4	5
<b>2</b>	Ability to electronically record client survey responses.	1	2	3	4	5
<b>3</b>	Ability to tally and report on survey responses.	1	2	3	4	5
<b>4</b>	Ability to query survey responses.	1	2	3	4	5
<b>5</b>	Ability to quickly print and present surveys or survey variations.	1	2	3	4	5
<b>6</b>	Ability to link surveys completed to individual client records.	1	2	3	4	5
<b>Totals:</b>		___	___	___	___	___
<b>Grand Total:</b>						

## Current Status Chart

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	Cliets	Groups	Projects	Contacts	Staff	Documnts	Relations	Other	Assets	Remindr	Stats	Surveys

### Current Status Results:

*In looking at each business area above, the ratings might be indicating to you:*

- 0-5**      *This business area is either not important for your business, or it needs immediate attention.*
- 6-10**    *This business area is either not significantly important, or is in significant need of attention.*
- 11-15**    *This business area has reasonable room for improvement.*
- 16-20**    *This business area has selected room for improvement..*
- 21-25**    *This business is area is looking good, with focused attention in some areas*
- 26-30**    *This business area is looking good, minor tweaking may be helpful.*