

# AHDB BOOSTS INFORMATION DELIVERY TO FARMERS AND GROWERS WITH A BESPOKE DOCUMENT AND RECORDS MANAGEMENT SYSTEM



The Agriculture and Horticulture Development Board (AHDB) helps farmers, growers and supply chain companies improve business efficiency, competitiveness, and productivity. AHDB is a statutory board, funded by industry levy. It provides levy payers with key research and marketing intelligence to prepare the business for future success.

## The Challenge

Easily access documents that staff members require; enable information in personal emails to be quickly shared; reduce potential for corporate memory loss through documents going astray; ensure AHDB is complicit with GDPR and able to transfer its data to The National Archive in the years ahead.



### Location

Warwickshire,  
United Kingdom



### Industry

Agriculture and  
Horticulture



### Products

Microsoft Outlook,  
Microsoft SharePoint,  
Microsoft Teams,  
CPS Professional Services

## Structured

AHDB works with organisations in many different sectors of the farming industry. It regularly communicates with thousands of levy payers and stakeholders, exchanging information on everything from pork marketing to leaf spot research. Since AHDB was formed in 2008, the volume and diversity of its digital content has grown significantly. Managing it was becoming a major challenge.

Finding the right documents and data was getting difficult for AHDB staff because naming standards, storage structures and retention policies were not always consistent. Valuable information was sometimes held in personal emails, so other users were unable to access it. Potential 'corporate memory loss' of documents was also a concern.

AHDB is committed to information transparency and was determined to resolve its document management issues. GDPR compliance, and the 20-year rule that requires statutory bodies to transfer content to The National Archives, added extra impetus.

## Architect Designed

Last year, AHDB laid the foundations for an electronic document and records management system (EDRMS) to meet its distinctive needs. Detailed requirements were gathered from a wide range of staff. Draft policies were created for document classification and retention periods. A deployment plan was developed for email, digital files, and physical files. Naming conventions were established.

"We had good building blocks in place," says Lee Warren, Head of Information Management and Security for AHDB, "but we needed an infrastructure to test them out, and to find what tools would work best to deliver our objectives."

CPS proposed a Proof of Concept to take the project forward. This would enable AHDB to road test its EDRMS plans with users throughout the organisation and then build and implement a Model Office Pilot based on that experience. CPS suggested that the solution should leverage AHDB's Production Microsoft 365 tenant. This would be cost-effective and use the proven capabilities of applications, such as Microsoft Teams, Outlook, and SharePoint.



"CPS provided architect-led expertise to build the Proof of Concept," says Lee Warren. "The CPS team listened carefully to what we wanted and provided good practical answers. They put real energy into a project we had been grappling with for a year, and within a few weeks we had a Model Office Pilot ready for implementing as our document infrastructure. We couldn't have done that alone."



## Flexible Future

AHDB knows its EDRMS solution will work in practice and has trusted CPS to help them implement it. Rollout will be a shared process, with CPS supporting AHDB trainers and six application champions to encourage user adoption of the new consistent practices.

CPS will implement an architecture that allows AHDB to spin up multiple collaboration sites for AHDB users' day-to-day work. When content reaches its natural end of life it can then be deleted, archived in place, or moved to the main document site to allow for retention and disposition.

"The solution will give people more confidence in the quality and currency of information we generate and share," says Lee Warren. "It should also make users more productive by being able to search for content faster and get what they want straight away. Our knowledge library, where we store archive material, will also be a lot easier to manage".

## Business Benefits

- Improved delivery of relevant information to levy payers' reporting.
- Better productivity as staff can quickly access the right documents and leverage email content.
- GDPR compliance and easy content migration to The National Archive in future.



## A word from our team

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We had the evidence that CPS were recommending a good solution from the moment we tested the Proof of Concept with 16 sample users. CPS made it easy for users to understand how the new document practices would work, and they endorsed the project with high approval scores. I went into meetings with users looking for problems and simply couldn't find them! Rarely have I known a project go so smoothly.

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**Lee Warren**  
Head of Information Management  
and Security for AHDB



## The Results

EDRMS solution will get documents labelled, stored, and retained consistently. Document management infrastructure supports addition of specialist software, such as a new tool to store email attachments for easy sharing. Oversight of all content ensures holistic control of data for compliance and migration.

## For More Information



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