

# Leveraging Technology to Build Better Policy Management

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**COMPLIANCE WEEK 2014**  
POWERFUL INSIGHTS, PRACTICAL IDEAS, REAL SOLUTIONS

#CW2014

# Leveraging Technology to Build Better Policy Management



**Inventory & Buy-in**



**Infrastructure**



**Meta Policy (Policy on Policies)**



**Leveraging Technology**

# Leveraging Technology to Build Better Policy Management



## Inventory & Buy-in

- Policy Management Today
- Policies & Procedures Matter
- Objective:

Get the **right information** in the right hands, **timely** to manage the business **efficiently, effectively and responsibly.**

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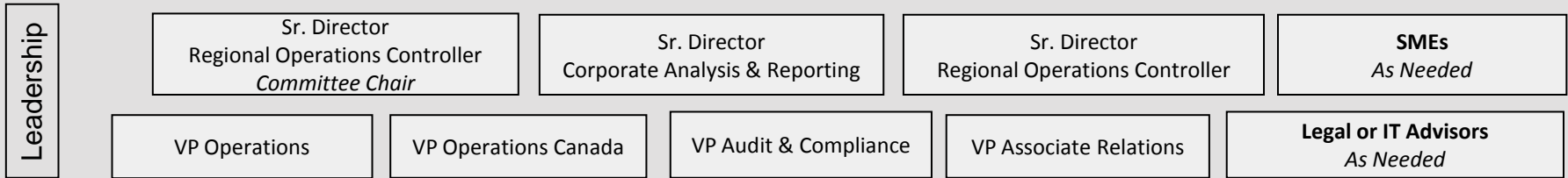


**Infrastructure**

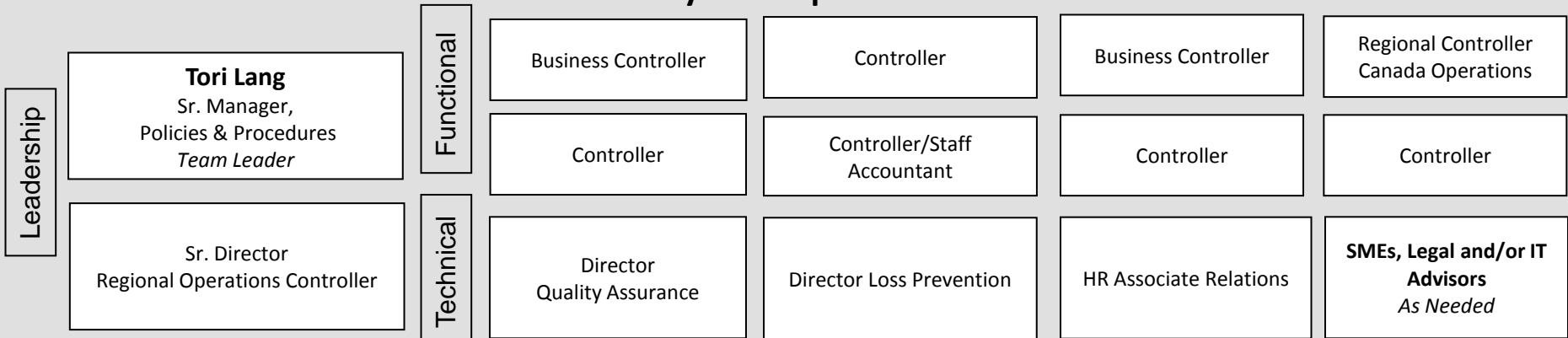
**Sponsor**

VP/Executive

## Policy Steering Committee



## Policy Development Team



# Leveraging Technology to Build Better Policy Management

## Steering Committee

- ✓ Clear authority for policy document review, approval, tracking deviations and retiring and archiving of documents
- ✓ Champion and advocate
- ✓ Review and approve: charters, scope, policy management process recommendation (i.e. Meta Policy)
- ✓ Prioritize, review and approve new and updated Operations Finance policy documents
- ✓ Guidance for communication, training & implementation
- ✓ Assess noncompliance

## Development Team

- ✓ Recommend scope
- ✓ Review and approve team charter
- ✓ Develop policy management process recommendation
- ✓ Execute policy development roles and responsibilities
- ✓ Recommend opportunities for policy updates and/or consolidation
- ✓ Evaluate deviation process and application for improvement

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## Meta Policy

**“Establishes development, approval and administration process for the creation, modification, deviation from, retirement of, issuance and maintenance of documents within Operations Finance scope.”**

- Policy Document Definitions
- Policy Lifecycle Roles & Responsibilities
- Policy Document Lifecycle Procedures, Workflow & Participation
- Style Guide & Template(s)
- Review Schedule

# Leveraging Technology to Build Better Policy Management



## Leveraging Technology

- Policy Deviation Application
- Policy Repository/Management Tool

## Key Benefits

- Accessibility & Mobility
- Promotes standardization and simplification
- Reduces administrative burden
- Decreases expenses through process optimization and increased productivity
- Mitigates risk
- Provides defensibility - assists in preventing incidents and losses
- Accessibility & Mobility!