

## **Electronic Records Management (ERM) Buying Tips**

1. **Engage NARA and GSA:** NARA and GSA have partnered to develop a premier solution for agencies looking to implement an ERM solution. Through this partnership we have assisted several agencies in developing their requirements and reviewing acquisition strategies. Take advantage of best practices by reaching out to the NARA and GSA teams early in the process. Please contact: [RecordsManagement@gsa.gov](mailto:RecordsManagement@gsa.gov)
  
2. **Needs Assessment:** The overwhelming feedback GSA has received from its industry partners is that ALL agencies should be conducting a needs assessment as a first step to their ERM procurement process. This assessment will help an agency avoid purchasing a solution that does not properly suit their needs or that cannot efficiently manage the agency's records.
  
3. **Surveying Contractors:** It is crucial to know the available providers and their capabilities. GSA recommends issuing a Request for Information (RFI) on GSA eBuy to help determine this information. GSA can assist you with this process or using the MRAS process described below, GSA can issue the RFI on your behalf. Agencies may also consider a Pre-Quote Conference or Industry Day to announce their requirement and gain valuable information from industry partners
  
4. **Utilize Market Research as a Service (MRAS):** Let GSA's Market Research As a Service (MRAS) team assist your agency in finding GSA Contract holders capable of meeting your procurement needs. Through online survey research, the MRAS team will work side by side with you in developing a strategy to effectively engage the marketplace. GSA's MRAS team will help you:
  - Define and identify suppliers and contracts
  - Research and identify supplier capabilities
  - Access hundreds of existing Market Reports
  - Provide a comprehensive market plan, including contract suggestions, socio-economics, and much more ... all at no cost!

Click [Here](#) to get started!

5. **Market Research GSA's Discovery tool:** GSA [Discovery](#) is a market research tool that helps you explore GSA services contracts, vendors, and vendor contract history to

determine whether a GSA contract can meet your needs. GSA added its ERM vendors under the Multiple Award Schedule (MAS) program to simplify the market research process, making it easier to search for ERM providers and their capabilities.

6. **Think Enterprise-Wide:** Whenever possible, consider taking an enterprise-wide approach to managing agency records. Developing ERM solutions for individual divisions or branches within an agency presents long-term challenges in managing and searching records. Maximizing the use of enterprise-wide solutions will enable a more efficient records management environment.
  
7. **Managing Cultural Change within the Organization:** There will likely be disruption to records owners during implementation, particularly if document scanning is involved, making it important to describe the benefits of the solution and managing expectations. Engagement from senior management will help champion these efforts and increase the likelihood of success.
  
8. **Anticipating Future Needs:** To the maximum extent practicable, consider the future records management needs of your agency. Explore available technologies and engage industry to project future needs and capabilities.