

80%↓

Document retrieval time

NARA

M-23-07 compliant

98%+

Retention compliance

KEY CAPABILITIES

- Records Management
- Content Management
- Document Automation
- Knowledge Management
- Information Governance
- Retention Management
- Search & Discovery
- FOIA Support

# Intelligent Content & Records Management Solution

Transform Information Into a Strategic Organizational Asset

## THE CHALLENGE

### Organizations Are Overwhelmed by Unmanaged Information

Every year, organizations generate more content across more systems — with no consistent governance, ownership, or retention management. The result is compliance exposure, knowledge loss, and staff spending hours searching for documents that should take seconds to find.

#### Compliance Exposure

NARA requirements, Privacy Act, and retention mandates go unmet

#### Knowledge Loss

Critical institutional knowledge disappears when employees retire or leave

#### Manual Document Handling

Staff spend hours routing, filing, and searching for documents

#### Information Silos

Content is scattered across departments, drives, and legacy systems

## OUR SOLUTION

### Complete Information Governance — From Capture to Archive

Synergistic Agility delivers a complete Intelligent Content & Records Management solution — governing the full information lifecycle from capture through classification, storage, governance, sharing, retention, and disposition as a managed program.

## HOW WE DELIVER



Assess



Design



Implement



Train



Support

# SYNERGISTIC AGILITY

## SBA 8(a)

Streamlined federal procurement

## IBM Partner

Certified in FileNet & Datacap

## NARA Experience

Federal records compliance experts

## Process Automation

Document automation at scale

## Knowledge Mgmt

Institutional knowledge preservation

## Mission Focus

Governance that enables operations

### EXAMPLE USE CASES

#### Enterprise Records Management

NARA-compliant records program with automated retention enforcement

#### FOIA Support

Enterprise search, retrieval, redaction workflow, and case management

#### Knowledge Management

Governed knowledge base preserving institutional memory and SOPs

#### Digital Mailroom

AI-powered document capture, classification, and routing at scale

#### Policy Management

Governed lifecycle management for all organizational policies and SOPs

#### Executive Knowledge Portal

Curated access to mission-critical reports, briefings, and guidance

### SOLUTION COMPONENTS

#### Advisory

- Records assessment
- Governance strategy
- Retention design

#### Technology

- IBM FileNet
- SharePoint
- Document automation

#### Accelerators

- Retention schedules
- Taxonomy models
- Policy templates

#### Managed Support

- Records ops
- Compliance monitoring
- Improvement

**Key Platforms:** IBM FileNet | IBM Datacap | Microsoft SharePoint | Microsoft Purview | OpenText  
*Technology supports the solution. It is not the solution.*

## Ready to Modernize Information Management?

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