SEE INFORMATION DIFFERENTLY

RECORDS AND INFORMATION MANAGEMENT: GETTING IT RIGHT FROM THE START

THE BASICS OF DIGITIZING
A QUICK GUIDE TO HELP YOU PLAN, EXECUTE AND BENEFIT FROM A DIGITIZING PROGRAM

Success in records and information management takes planning, organization and a strategy for taking control of physical and digital records from creation through active use to secure storage, permanent storage or planned destruction. Done well, records and information management will help your organization limit information risk, manage costs and lay the foundation for big data analytics.

68% agree that business-at-the-speed-of-paper will be “unacceptable in just a few years” time.

AIIM - Paper Wars 2014 - An Update from the Battlefield
WHY DIGITIZE?

Mismanaged information can slow down your processes, frustrate your customers and reduce efficiency. Not to mention burden your business with the cost of storing paper in premium-priced office space. Your records retention schedule and investment in secure offsite storage combined with intelligent digitizing will give you access to the information you need when you need it. For many businesses, easy access to records from multiple sites is a necessity. From construction to R&D, HR to marketing, document sharing and collaboration are essential for the success of your business.

WHERE IT STARTS

Before you begin your digitizing project, assess what you want to achieve. Consider:

► Searchability/sharability – Physical records can be spread across systems, applications, departments and locations. Information’s ability to spread and change shape makes it extremely challenging and costly to find and access. Digitized records in controlled repositories make it easier for people to access what they need when they need it.

► Process productivity – Frequently, companies don’t have their records management processes and procedures under control. To counteract operational inefficiencies, look for work processes that make it easier or more efficient to convert paper to digital records.

► Reduced storage space – Physical records can take up expensive office space and, over time, slow down retrieval. Digitized records can free up valuable real estate and increase access.

The biggest drivers for scanning and data capture:

An enforceable records retention schedule will help your organization keep records needed for legal, compliance and business reasons and let you know when they can be disposed of. A culture of keeping everything just in case can be expensive and deter efficiency. Our short guide, Getting it Right from the Start, The Basics of Records Retention Schedules can help you take important steps.

Once you know what you’re keeping and where it’s kept, you’ll be in a better position to make a scanning project effective. Clearly, it isn’t a matter of scanning every document in your archive and all the information that
enters your business. Iron Mountain can help you solve complex records management problems and determine which documents are used infrequently and are right for closed-box storage. We also offer open-storage options to help you access documents you need to view frequently. Activefile® management can help you optimize the process of finding documents and make it easier and faster to deal with paper records.

1. ASSESS THE SITUATION

Any digitizing project for records management will start by establishing some basic facts. You will need to know:

- Where your records are located
- Whether your records are being tagged properly
- What technologies are being used to create and store records
- What technologies and quality control process is in place for digitizing
- How different departments and locations handle records, if the function is not already centrally coordinated

If a business process has already been digitized, find out how the process was planned and delivered. See if there are any lessons learned you can take advantage of. Is it working well? Is the capture system effective? If you have no existing paper-free processes, select a trial carefully. You’ll also need to review your policies and determine weaknesses in compliance. This can be a challenging process, but it can go much more smoothly if a third party like Iron Mountain is there to help.

2. DEFINE YOUR GOALS

A successful digitizing project needs a clearly defined aim. Transformation does not happen at the flip of a switch or the click of a mouse. Working on one project at a time lets you plan for both costs and returns. Whether your digitizing project is large or small, decide what it is you want to achieve. Think of what improvement means to the wider business and how you might measure it. For some organizations, it could be speeding up customer service inquiries, so you will need to decide how to measure your goals as well. For other businesses, the goal could be increased document sharing and collaboration, so the measures will be entirely different.

3. EXAMINE MANUAL AND PAPER INTENSIVE PROCESSES

Work with people in business units to uncover how the process you’ve selected actually works – and where it’s going wrong. Find out where paper:

- Enters the business
- Becomes part of a process
- Clogs up the workspace
- Restricts access to information
- Creates a bottleneck in a process
Your aim isn’t just to scan the right documents, but also to reduce or stop the flow of paper into a process. Find out where the paper is coming from and develop a unified solution. Sometimes, it’s not just about paper; it can also be about turning an electronic record back into paper for processing. Look at the process you want to transform carefully.

4. PRIORITIZE JUDICIOUSLY

Determine the importance of each document so you scan what you need access to. This will eliminate the need to use paper as part of a business process. It will also allow you to create easily indexed records in a common, searchable format.

5. BRING PEOPLE WITH YOU

In order to achieve change, you’ll need to convince senior stakeholders of the value digitizing offers. And you’ll also need to convince the people who use information in their jobs that digitizing will benefit them. Work closely with both decision makers and records users to ensure you create and deliver a plan that’s fit for purpose and makes a strong business case.

Depending on the structure of your organization you can involve:

- IT
- Finance
- Compliance
- General counsel
- Procurement managers
- Department managers

Complete a process audit so senior stakeholders can clearly see why a business process is slow or cumbersome. Work closely with teams who use information and include their ideas and suggestions in your plans.

60% of users have seen ROI on their paper-free projects within 12 months and an impressive 77% within 18 months.

AIIM – Paper Wars an Update from the Battlefield, 2014
6. PLAN AND EVALUATE

Some businesses have hundreds of processes involving digital records. Look at the systems your business uses to capture information and consider the value of simplicity. The rationale for a single system that can service multiple processes across multiple sites is clear. Working with Iron Mountain will give you access to the latest thinking on digitizing and the guidance of a trusted advisor.

CONTINUE THE PROGRESS

To stay competitive, businesses need to be prepared for a dispersed, mobile and even global workforce. Digitizing will give people rapid and secure access to information – information that allows them to do their jobs. Organizations of all sizes and types should invest in digitizing to progress now and in the future.

If you’d like slides with our latest research to help you make the business case for digitizing, download them now.

DOWNLOAD SLIDES

APPENDIX 1

TIPS FOR PREPARING YOUR PAPER DOCUMENTS FOR SCANNING

So many documents are born digital, but if your project includes scanning paper records, you’ll need to plan for manual scanning.

- Identify illegible documents for separate processing
- Tape torn documents, using non-yellowing matt-finish tape
- Sort documents into batches by size, color, date, document type, etc.
- Align all pages to the same orientation so that the top of every page faces the same way and the front of every page faces the same way
- Save binding materials for later re-assembly
- Carefully unfold and smooth out paper documents
- After scanning, log the documents that were scanned
- Remove staples, paper clips and other fasteners

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