Image Credit: Iron Mountain

Six steps to successful digitisation

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Poor records and information management can slow down your processes, frustrate your customers, and reduce efficiency. One solution that an increasing number of businesses are implementing is digitisation.

Deciding to convert paperwork to digitised records that can be stored in controlled repositories makes it quicker and easier for your team to access what they need when they need it. Digitising records provides easy access to archives from multiple sites and saves the cost of storing paper in expensive office space.

Digitising your paper records can be broken down into six steps:

Step One – Assess the situation

Any digitising project for record 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 digitising
- How different departments and locations handle records if the function is not already centrally coordinated

Step Two – Define your goals

A successful digitising 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 digitising project is large or small, decide what it is you want to achieve.

It is important to consider what improvement means to the wider business and how you might measure it.

Step Three – Examine manual and paper-intensive processes

Work with your employees to uncover how the process you've selected works – and where it's going wrong.

Establish where paper:

- Enters the business
- Becomes part of the process

- Clogs up the workspace
- Restricts access to information
- Creates a bottleneck in a process

Your aim isn't just to scan the correct 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.

Step Four – Prioritise 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.

Step Five- Bring people with you

Organisational change is never easy. To achieve a successful transition, you'll need to convince everyone in the company of the value that digitising offers. And you'll also need to convince the people who use information in their jobs that digitising 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.

Step Six – 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.

A trusted partner to manage your digitisation

Digitising your records is a complex project that can be overwhelming and a time-consuming distraction for business owners and managers. Iron Mountain has successfully guided hundreds of organisations like yours through the process of converting paper-based documents to digital files.

Our document digitisation service will integrate your organisation's documents into one secure, streamlined system. Whether you need to convert your hard-copy files, financial records, legal documents or other important information, Iron Mountain's bulk scanning solutions allow you to maintain compliance and improve turnaround times, so you spend more time on core business activities.

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Through a range of services including digital transformation, data centres, secure records storage, information management, secure destruction, and art storage and logistics, Iron Mountain helps businesses bring light to their dark data, enabling customers to unlock value and intelligence from their stored digital and physical assets at speed and with security while helping them meet their environmental goals.

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