IRON MOUNTAIN SMART SORT

TAKE CONTROL OF YOUR RECORDS INVENTORY

IRON MOUNTAIN®

ACHIEVE YOUR INFORMATION GOVERNANCE AND BUSINESS OBJECTIVES

YOUR CHALLENGE

YOU NEED TO SORT AND REORGANISE YOUR RECORDS INVENTORY TO MAKE DEFENSIBLE DECISIONS ON DISPOSITION. UNFORTUNATELY, THIS IS NOT AS SIMPLE AS IT SOUNDS.

WHAT MAKES DISPOSITION SO COMPLICATED?

> **Lack of Inventory Integrity/Visibility:** When key metadata is not captured and listed throughout the information lifecycle, it is difficult to search, manage, and make decisions on what records to retain, digitise, or destroy.

> **Commingled Record Types and Event Date Complexity:** Different record types have different requirements. If records are not organised according to record classification or event date, you can't confidently and defensibly take action.

> **Reorganising Records is Labour-Intensive and Expensive:** You lack the resources to sort each file by destruction eligibility date, record type, a unique identifier, or other requirement.

WHAT THIS MEANS

> **Unnecessary Cost:** Large volumes of records without file-level metadata that are stored without regard to destruction eligibility dates or record classification will impact your ability to effectively manage your program.

> **Increased Risk:** Holding on to records longer than necessary increases the risk of information loss and regulatory violations. It also adds complexity to legal discovery, audit response, and compliance management processes.

> **Lost Productivity:** Finding what you need and making quick decisions on records disposition requires a well-organised inventory. Without an efficient process to sort and reorganise files, you could lose time and delay your critical objectives.

DO YOU...

> have a large volume of inherited records?

> have trouble finding records when you need them?

> want to relocate inventory but first need to destroy what you no longer need?

> want to destroy records but can't confidently isolate which ones are eligible without a substantial investment?

> want to go paper free but find it difficult to make decisions about which records to digitise?

> need to isolate records for a merger, acquisition, or divestiture?

If you answered yes to any of these questions, ask us about Iron Mountain Smart Sort.

OUR TEAM CAN SUPPORT YOU FROM IRON MOUNTAIN RECORD CENTRES OR AT YOUR LOCATION. IF YOU HAVE RECORDS IN-HOUSE OR AT AN OFFSITE STORAGE FACILITY, WE CAN SUPPORT YOUR NEEDS.

SIMPLIFY AND EXPEDITE DECISION-MAKING

With Iron Mountain Smart Sort, you can quickly and confidently make decisions about your legacy files to enable a more compliant and efficient records management program.

Our trained records management team will use input from your database and records retention schedule to automate defensible decision-making at the file level. We will sort and reorganise your records so that you can confidently make decisions about disposition and quickly meet business objectives, like responding to a divestiture, legal matter, or destruction requirements.

The **Smart Sort** process enables **automatic decision-making** about how each file should be managed in order to meet the specific requirements of your organisation.

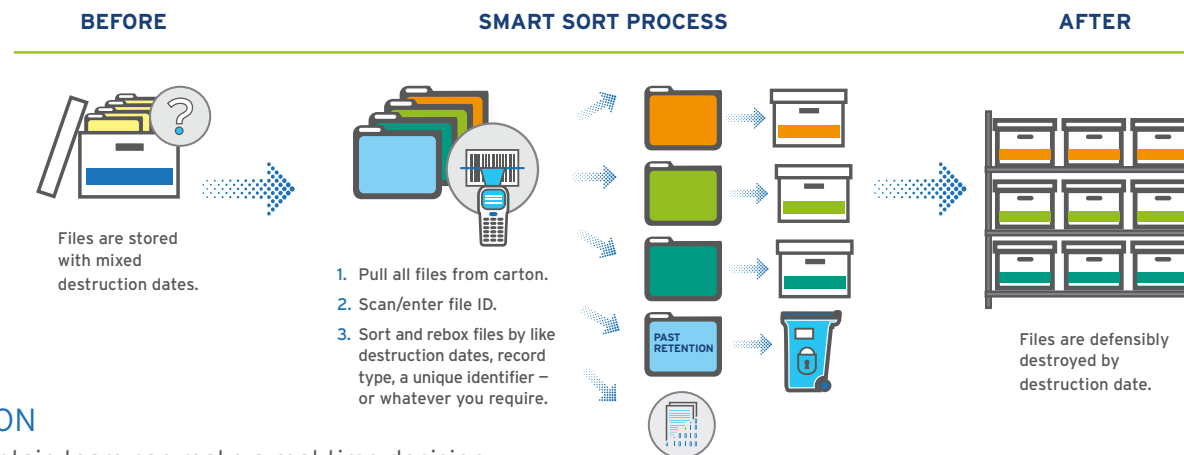## SMART SORT ENABLES YOU TO MAKE DEFENSIBLE DECISIONS BY SORTING AND REORGANISING RECORDS BY:

DESTRUCTION DATE | Sort and reorganise your records according to destruction eligibility year so that you can confidently destroy paper documents as they meet retention dates.

CATEGORY | Initiatives, such as divestiture, require the need to isolate records in a short period of time. We will sort and reorganise your records according to record type, record status, unique identifier – or whatever you require.

ASSOCIATION | If you do not require sorting and reorganising of your inventory, leverage Smart Sort to apply metadata to records at the file level so that you can avoid the high cost of manual file-level listing.

MAKE DECISIONS ABOUT WHICH FILES TO RETAIN, DESTROY, OR DIGITISE

How Smart Sort Works

BEFORE

SMART SORT PROCESS

AFTER

Files are stored with mixed destruction dates.

1. Pull all files from carton.
2. Scan/enter file ID.
3. Sort and rebox files by like destruction dates, record type, a unique identifier – or whatever you require.

PAST RETENTION

Files are defensibly destroyed by destruction date.

BUDGET-FRIENDLY SOLUTION

With a single touch, the Iron Mountain team can make a real-time decision, based on your retention policy, about what to do with your file. This drives significant efficiencies, allowing us to deliver a truly cost-effective solution.

SMART SORT EXAMPLE ENGAGEMENT

CHALLENGE

A large healthcare organisation wanted to reduce cost and risk by destroying records that had met retention requirements. However, they were not able to easily and defensibly identify which records were eligible for destruction, as they lacked the budget required to undertake a long-term and labour-intensive discovery project. Constrained by limited resources, the organisation's push for defensible destruction was at a standstill.

SOLUTION

Following the Smart Sort process, Iron Mountain's team retrieved 48,000 cartons of records and reviewed the contents at the file level. In real time and with one touch of the file, they sorted and reboxed all files by future destruction date and in accordance with the retention schedule while identifying those records that were eligible for destruction.

RESULTS	
	› Gained the ability to confidently destroy 1.4M files
	› Reduced storage costs while meeting compliance requirements and reducing risk
	› Established a process for ongoing destruction

WANT TO LEARN MORE?

To learn more, contact your Iron Mountain account manager directly, or fill out this form to request more information. Include the words Smart Sort in the comments section.

ACHIEVE INFORMATION GOVERNANCE GOALS AND MEET YOUR BUSINESS OBJECTIVES WITH SMART SORT

› **MAKE QUICK AND CONFIDENT DECISIONS**

- Iron Mountain leverages data from your existing database and retention schedule to automate defensible decision-making.

› **SIMPLIFY FUTURE DECISION-MAKING**

- Stored records will be sorted according to destruction eligibility year, record type, a unique identifier – or whatever you require.

› **REDUCE PROGRAMME COSTS AND RISKS**

- Initiate immediate destruction of eligible records to reduce storage costs and mitigate legal discovery, audit, and compliance risks.

› **IMPROVE FIND RATES**

- At the completion of your Smart Sort project, you will have an up-to-date listing that enables accurate and efficient records management.

**Cost-effective, efficient, insightful.
Take control with Iron Mountain Smart Sort.**

WE PROTECT WHAT YOU VALUE MOST®

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