

# SMART DIGITIZATION BEGINS WITH SMART SORT

OVER **90%** OF ORGANIZATIONS PLAN TO ADOPT A “DIGITAL-FIRST” STRATEGY, AND OVER **50%** HAVE ALREADY DONE SO, ACCORDING TO [FOUNDRY'S 2021 DIGITAL BUSINESS SURVEY](#). GETTING TO THIS GOAL MEANS MINIMIZING THE ROLE PAPER PLAYS IN WORKFLOWS AND BUSINESS PROCESSES.

There are numerous reasons not to use paper anymore. Paper documents are easily lost or misplaced, impossible to search, and difficult to share. Perhaps the greatest shortcoming of printed documents, though, is that they must be processed serially. This prevents organizations from realizing the enormous productivity benefits of using parallel, automated workflows.

Research conducted by Economist Impact and supported by Iron Mountain found that 93% of executives want to clean up their records. The cleanup process involves sorting, organizing, and culling the inventory to make it easier to identify what records should be digitized, but the task is complicated when organizations don't have a complete picture of their inventory.

The sheer scale of the process can also seem overwhelming. “Organizations are reluctant to do this themselves because some have tens of millions of records and struggle with establishing a cost-effective solution,” says Andrew Kern, an Iron Mountain program manager. “They have a need to digitize the right records but they struggle to take action when they don't know what they have and where it's located.”

The good news is that many documents should not be

digitized at all. And some have already reached retention requirements and should be destroyed.

Many organizations retain paper records longer than they are required to, and human nature is one reason why. People have a natural proclivity to hold on to things too long because of the remote possibility that they may someday be needed. There are also compliance reasons. Boxes of records may be inadequately indexed or not indexed at all. Records acquired during a merger or acquisition may use a different indexing taxonomy. And files often become comingled, making disposition decision-making nearly impossible. Whatever the reason, it all leads to an inability to defensibly destroy records. The longer records are retained, the bigger the conversion task becomes and the harder it is for people to find the information they need.

There's also a risk of legal or regulatory exposure. In the event of litigation, “If it's still around you have to produce it,” says Sue Trombley, managing director of Thought Leadership at Iron Mountain. Some regulations also levy fines for over-retention. Bottom line: “It's good records and information management to securely and defensibly destroy records you are no longer required to retain,” Trombley says.

## THE FIRST STEP IN THE DIGITIZATION PROCESS

You can simplify the digitization process by first taking stock of the records you have in your inventory and deciding what to keep and what can be defensibly destroyed. You may be surprised to find out how much smaller the task becomes after you complete this process.

With a culled inventory, you can start making informed decisions about which records need to be digitized and which should stay in paper form. For starters, many records don't need to be converted at all. These include infrequently accessed records and historical documents that need to be kept on hand strictly for archival purposes.

Conversely, records that should be digitized include those that are frequently accessed, are needed to support remote/hybrid employees, have value, and may be used for analytics or monetization along with other high-value purposes. You may already know what you need to digitize or apply a solution that accelerates the process.

Sorting through millions of documents has long been expensive and time-consuming, but automation can now be brought to bear to significantly streamline the process. Iron Mountain's Smart Sort service leverages a customer's database and records retention schedule to assess destruction eligibility and classify files according to their characteristics.

By using the customer's business data and records retention schedule to inform decisions, Iron Mountain Smart Sort eliminates the need to involve domain experts, removing one of the most expensive elements of a records cleanup project. "Traditionally we'd need to have someone with the expertise to identify file types and know what rules govern them," Kern says. "The technology now gives us the ability to make immediate decisions on disposition in real time."

## DEFENSIBLE DECISION-MAKING

By using the customer's database and retention schedule, Smart Sort provides a defensible and standardized process. Every file that's processed is individually listed in an inventory, and a certified destruction certificate is created whenever files are discarded.

Smart Sort then reorganizes records according to their destruction eligibility year, so customers can confidently dispose of records according to policy - now and in the future. "Smart Sort is technology-enabled which means that we don't need to employ talent with specific records-type expertise and dedicate them to this work," Kern says. "We can train our current employees to do this and it's not only more efficient but also more accurate."

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Customers can specify what should be done with retained records, whether indexed and kept on paper or digitized and then destroyed. Either way, the process ends with the organization knowing exactly what records it has and where to find them.

Organizations that have been holding back on a records cleanup project because of cost, time commitments, or complexity now have a simple and faster path to completion. "For organizations that are no longer generating paper records, this is their path out of legacy paper," Kern says. "It's the last mile in the path toward digital transformation."

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### ABOUT IRON MOUNTAIN

Iron Mountain Incorporated (NYSE: IRM), founded in 1951, is the global leader for storage and information management services. Trusted by more than 220,000 organizations around the world, and with a real estate network of more than 85 million square feet across more than 1,400 facilities in over 50 countries, Iron Mountain stores and protects billions of information assets, including critical business information, highly sensitive data, and cultural and historical artifacts. Providing solutions that include secure storage, information management, digital transformation, secure destruction, as well as data centers, art storage and logistics, and cloud services, Iron Mountain helps organizations to lower cost and risk, comply with regulations, recover from disaster, and enable a more digital way of working. Visit [www.ironmountain.com](https://www.ironmountain.com) for more information.