5 STEPS TO PREP FOR DIGITIZATION

A CHECKLIST

Evolving to a more digital way of working is a journey. Digitizing paper records is a vital step on that long road. Don't stumble through the process. Set your organization up for a win by completing this checklist before you begin.

1   **GET YOUR HOUSE IN ORDER**

Locate and organize your paper records. Keep what you must, shred what you don't.

What do you have? Do you need to keep it, why and for how long?

2   **CHOOSE A STARTING POINT**

Pick a single business process to digitize first.

Where can digitizing have the most impact in terms of increased efficiency and showed value?

3   **DEFINE SUCCESS**

Outline what impact you want this project to have on your organization.

What pain points will be addressed? What workflows will be affected?

4   **BUILD A BUSINESS CASE**

Align the specific business goals of this digitization project with the broader business goals of your organization.

Why is this project important? Who will it benefit? What will it change – and how?

5   **PUT A TEAM TOGETHER**

Create a cross-functional team from key departments who will own – and run – this project with you.

Who needs to get on board – IT, Legal, Operations?

Now you know what you're going to digitize, why and with whom. The next step is the "how." You can do the scanning in-house but professional-grade imaging equipment is a massive investment and properly indexing scanned documents isn't something you want to get wrong.

Your best bet is to partner with a vendor who has the capability to complete your digitization project and help you manage the new balance of physical and digital records.

IRON MOUNTAIN®

TRANSFORMATIVE SOLUTIONS FOR A DIGITAL AGE

There is no perfect pathway to digital enlightenment – each organization approaches the challenge of how to work more digitally from a different perspective. Wherever your organization may be on the long road to true digital maturity, Iron Mountain has the solutions, technology and expertise necessary to help you evolve further.

Click a circle below to learn more.

SC
DOCUMENT
SCANNING

ST
DIGITAL
STORAGE

WA
WORKFLOW
AUTOMATION

AS
ADVISORY
SERVICES

PC
POLICY
CENTER

SOLVE: DIGITAL SOLUTIONS

SC **Document Imaging/Scanning**
Configurable and flexible solutions built around your organization's needs and the way you work.

> **Day Forward Scanning**
Scan, index and convert your paper documents when they are produced or received in the normal course of business.

> **Backfile Scanning**
Quickly convert legacy paper records to digital files, prioritizing conversion by your specific needs.

> **Image on Demand**
Scan only the records you need, when you need them. By selectively scanning only the portions of the record that you need, you can significantly reduce conversion costs.

ST **Digital Storage**
Iron Mountain Insight® Essential Edition enables you to take the first step on your digital transformation journey by providing a subscription solution that combines scanning of physical documents and digital storage in a secure cloud repository. You have the option to ingest documents from other digital repositories.

EVOLVE: INFORMATION GOVERNANCE (IG)

WA **Workflow Automation**
Capitalize on digitization by making processes more effective and efficient. Increase accuracy and reduce administrative burden by automating back office workflows including human resources, contracts management and accounts payable/receivable.

AS **Advisory Services**
The most experienced IG consultancy in the industry will help you optimize retention, privacy, compliance, content classification and risk management practices. You can even have your own IG experts placed in your organization for short- or long-term projects.

PC **Policy Center Solution**
Manage your compliance responsibilities with a legally defensible and always current retention schedule. Through an intuitive web-based dashboard, you can easily demonstrate compliance with current regulations, make edits to record classes and share the policy to drive compliance across the organization.

Speak with an Iron Mountain Solution Specialist today.
Call 1-800-899-4766

IRON MOUNTAIN®