

CLOSING A FILE ROOM?

DON'T JUST MOVE RISK, MITIGATE IT

Once a bustling hive of activity, file rooms have become quiet with the shift to electronic processing. For years that space has likely sat untouched, but now you need to dust it off as you contemplate closing an office, consolidating locations, or freeing up room to accommodate an agile workforce or new strategies.

There is an inclination to pack your file room into boxes and send records off to archival storage. But there are many more aspects beyond storage to consider when decommissioning a file room. It's not only a great opportunity to clean up your records inventory, but, by taking the right steps, you can save money on storage while reducing the risk that comes from over retaining records.

CHECKLIST: CONSIDERATIONS FOR FILE ROOM CLOSURE

BEFORE BEGINNING A PROJECT, YOU'LL NEED:

- An up-to-date, authorized records retention schedule
- A database that contains information about the individual files or boxes of files
- A way to identify files that have met retention requirements AND ensure destruction decisions are defensible
- A process to identify files according to destruction eligibility dates in the future
- Methods that allow your employees to find what they need quickly so they can easily continue to do their jobs and follow records management best practices
- A plan for what to do with racking and physical storage mediums, as well as a way to sustainably remarket, recycle, or dispose of them

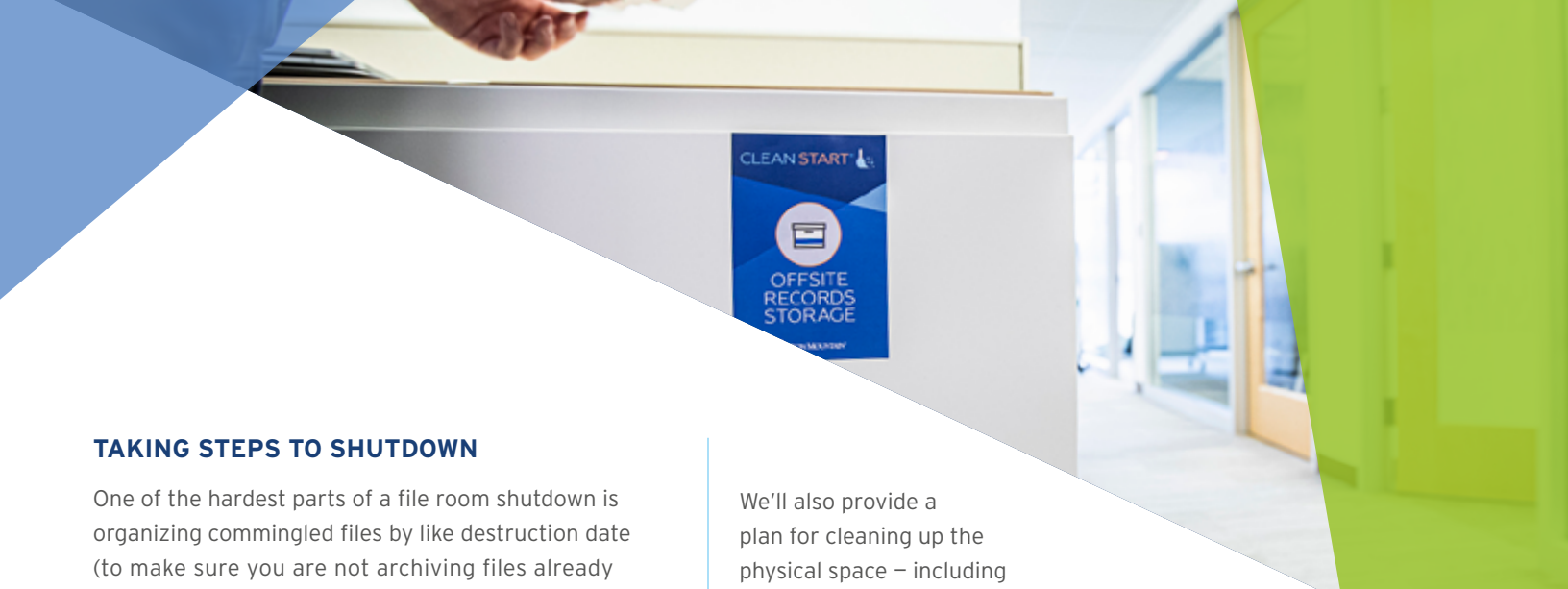
AS YOU PROCEED, YOU'LL NEED TO CONSIDER THESE POINTS:

- Understand file retrieval and refile activity
- Define how the process to request files and information will change
- Ability to scan with quality and securely deliver images to a distributed workforce on a timely basis
- Account for files at desks of employees (some of whom may not have been in the office for months)
- Account for interfiles and document inserts
- Option to keep a portion of files (those that are active) on open shelving
- Retention policy for files that have been imaged
- System of record for imaged files and records retention enablement
- Legal discovery and litigation hold processes

AND YOU'LL STILL NEED TO:

- Transport and store what you need offsite in a highly secure manner
- Ensure it is all cost-effective and its maintenance sustainable for the organization within your defined budget





TAKING STEPS TO SHUTDOWN

One of the hardest parts of a file room shutdown is organizing commingled files by like destruction date (to make sure you are not archiving files already beyond required retention) before putting them in storage boxes. [Iron Mountain Smart Sort](#) uses your database and retention schedule and provides a technology-enabled process to identify retention requirements for your files. We will destroy all records that have met retention requirements and then prepare and box all files that haven't met retention requirements by like eligibility date.

This solution not only culls your inventory but also provides a standardized process for continuing to address defensible disposition moving forward. During the process, files likely to be recalled by end users or those that are important to have in digital form can be tagged for imaging during the sorting process.

With a clean slate and organized inventory, you have a strong foundation to digitize what you need going forward. Our [Document Scanning and Digital Services](#) allow you to support your organization's move to a paper-lite environment. This helps you continue to streamline processes, support remote work, and expand information security.

We'll also provide a plan for cleaning up the physical space – including what to do with racking, cabinets, and any equipment left in the file room after it's shuttered. With [Iron Mountain Clean Start](#), we conduct a comprehensive assessment of the space and make recommendations for a complete closure. Assets no longer needed are removed and remarketed or recycled, or they can be securely stored in one of our facilities should you need them in the future. This includes furniture, equipment, supplies, and more.

And, in the event that you require ongoing support, [Iron Mountain's Dedicated Professional Services](#) team assures all defined processes and procedures are adhered to throughout the engagement and beyond. Acting as the connective tissue throughout your organization – from end-user support to end-of-lifecycle disposition – our qualified professionals ensure all KPI's are met to steadily drive your program forward.

Don't just move risk – mitigate it now and protect your organization into the future.

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