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MOUNTAIN®

**WHITE PAPER**

# DIGITISING 101 FOR RECORDS AND INFORMATION MANAGEMENT

# INTRODUCTION

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## HOW A DIGITISING PROGRAM GUIDE HELPS YOU PLAN, EXECUTE AND ELEVATE YOUR COMPANY RECORDS

Successful Records and Information Management (RIM) takes planning, organisation and a comprehensive strategy. With many moving parts for taking control of physical and digital records from creation through active use to secure storage and possible planned destruction, a well-thought out plan is key. Done well, RIM will help limit information risk, manage costs and lay the foundation for big data analytics in your organisation.

### WHY DIGITISE NOW?

Slower processes. Frustrated customers. Reduced efficiencies. This is what awaits your business with mismanaged information.

If the pandemic has taught us anything, it's that storing paper in premium-priced office space isn't always worth the cost. Many organisations are evaluating square footage needs and determining how much they really need. Through digitising current and legacy records, people are learning they can eliminate space taken up by physical onsite paper storage.

With the right solution, either an offsite or data centre based storage option, you gain access to your information whenever you need it while streamlining your records retention schedule. From construction to R&D, HR to marketing, document sharing and collaboration are essential for the success of your business and digitisation of files makes it all possible.

### WHERE DIGITISING STARTS

Before you begin your RIM digitizing project, consider the following when assessing what you want to achieve:

- **Searchability/Shareability:** Records are typically spread across systems, applications, format types, departments and locations. As such, information's ability to spread and change shape makes it challenging and costly to manage. However, controlled digital record repositories make it easier for people to access any file at any time.
- **Process Productivity:** Records management processes and procedures can be hard to keep under control especially when it's not in a digital format. To counteract operational inefficiencies, look for work processes that can be made easier or more efficient by converting paper to digital records.
- **Office Space Usability:** Physical filing cabinets full of papers can take up expensive office space and, over time, slow down important document retrieval. Digitised records can free up valuable real estate and increase information access.

## SCANNING AND DATA CAPTURE'S BIGGEST DRIVERS:

### RECORDS SECURITY AND COMPLIANCE

While a “keep everything just in case” mentality may seem well intentioned, it can often be expensive and hinder operational efficiencies. To determine what to keep and what to dispose of for legal, compliance and business reasons, an enforceable records retention schedule is a necessity. In our short guide, [Getting it Right from the Start, The Basics of Records Retention Schedules](#), we've clearly outlined ways to help you take important steps towards creating a retention schedule for your organisation.

Once you know what you're keeping and where it's kept, you'll be in a better position to make a scanning project effective. Without scanning every document in your archive and all new incoming information, Iron Mountain can help you solve complex records management problems. Not only do we help determine which documents are used infrequently and are right for closed-box storage but we also offer open-storage options to help you access documents you regularly need to view.

# STEPS TO SUCCESSFUL DIGITISING

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## 1. ASSESS THE SITUATION

Here, we've outlined baseline details needed for any records management digitising project:

- › 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

Part of the digitising process also includes taking inventory of any business processes that have already been digitised to see if there are any applicable lessons learned. If you have no existing paper-free processes, carefully select a small trial, assess its results and then apply it to larger projects.

In addition to the initial assessment that includes analysis and digital process inventories, you'll also need to review your policies to determine any compliance weaknesses. All of this can be a stressful and arduous process for your team, but that's why third parties like Iron Mountain are here to help.

## 2. DEFINE YOUR GOALS

Digital transformation does not happen at the flip of a switch or the click of a mouse.

Successful digitising projects need clearly defined goals at the onset. Whether your digitising project is large or small, decide what it is you want to achieve. Think of what improvement means to the wider business and how you might measure it. Because each department services a different part of the businesses' needs, there will likely need to be unique goals for each in place.

## 3. EXAMINE MANUAL AND PAPER INTENSIVE PROCESSES

Look at how the current processes you have in place actually work - not just what's going right, but also what's going wrong. To do this, your team needs to find out where paper:

- › Enters the business
- › Restricts access to information
- › Becomes part of a process
- › Creates a bottleneck in a process
- › Clogs up the workspace

Your digitising aim can't be to just scan the right documents. It also needs to include a way to reduce or stop the flow of paper into a process.

Carefully look at the process you want to transform to find out where the paper is coming from and develop a unified solution.

## 4. PRIORITISE APPROPRIATELY

Scan what you need access to first to help determine the importance of each document. This helps 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.

## 5. BRING PEOPLE WITH YOU

In order to achieve change, you'll need to convince senior stakeholders and those who use information daily for their jobs the value of digitisation. Work closely with both decision makers and record users to ensure you create and deliver a purposeful plan that makes a strong business case.

Depending on the structure of your organisation, here are the groups you can involve:

- › IT
- › General counsel
- › Finance
- › Procurement managers
- › Compliance
- › Department managers

Complete a process audit that includes lower level team input before speaking to senior stakeholders so they can clearly see why a slow or cumbersome process needs digitisation.

## 6. PLAN AND EVALUATE

Depending on the size of your company, there may be hundreds of processes that touch digital records. Due to the many moving pieces, the rationale for a single system that services multiple processes across multiple sites is clear. Working with Iron Mountain will give you direct access to the latest best practices on digitising with the guidance of being your trusted advisor.

### CONTINUE THE PROGRESS

The global pandemic of 2020 has only served to clarify that to stay competitive, businesses need to be prepared for a dispersed, mobile and even global workforce. Digitising will give people rapid and secure access to information - thereby allowing them to do their jobs from anywhere and help grow your business.

Invest in digitising today to accelerate progress now and evolve alongside the future of business processes.

## APPENDIX 1

### TIPS FOR PREPARING YOUR PAPER DOCUMENTS FOR SCANNING

- › Identify illegible documents for separate processing
- › Sort documents into batches by size, color, date, document type, etc.
- › Save binding materials for later re-assembly
- › Carefully unfold and smooth out paper documents
- › Remove staples, paper clips and other fasteners
- › Tape torn documents, using non-yellowing matt-finish tape
- › Align all pages to the same orientation so that the top of every page faces the same way and the front of every page faces the same way
- › After scanning, log the documents that were scanned

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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 organisations 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 centres, art storage and logistics, and cloud services, Iron Mountain helps organisations to lower cost and risk, comply with regulations, recover from disaster, and enable a more digital way of working.