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Record Management

Three different reasons to outsource your Records Management

Recent research by Iron Mountain shows that 94% of organizations intend to apply more budget and resources to their information management programs. While that is an impressive statement of desire, many stop there and are confused as to how to get to the next stage - actually implementing any, let alone all, of any potential improvements. A massive 72% lack a strategic, multi-year plan for records and information management – so how can an organization actually deliver against their information management strategy?

Three different reasons to outsource your Records Management

Records management is not easy — if it was everyone would be doing it brilliantly already, and they patently are not, otherwise they wouldn't be looking for improvements. Furthermore, improving internal records management systems requires investment in tools, techniques, staff and training — none of which are quick, cheap or easy.

This is where the outsourced records management industry comes to play. Outsourced records management takes several forms and covers many different aspects, and to hope to cover them all in one article is overly ambitious. Instead, we look at three specific areas in which outsourced records management can make a major difference to an organizations desire to move their information governance and access in line with their strategic goals.

All records are not created equal

One of the challenges with records management is that not all records need to be treated the same - certain records will need frequent access, some may only be retrieved a couple of times after filing, some potentially never at all. Understanding this issue enables an organization to create a multi-tiered approach to management that allows infrequently accessed records to be stored in a different way to frequently accessed documents. Furthermore infrequently accessed documents may not need to be electronically archived, but simply shipped to an outsourced records management facility.

This delivers benefit on a number of levels. It reduces the physical footprint in your offices - which becomes increasingly important as the volume of content being stored by organizations grows. It also removes the need for un-necessary scanning and meta-tagging of this content. Information that does not need to be frequently accessed can literally be put in a box and filed away - a service that an outsourced records management provider can provide, with the added insurance that those documents can be rapidly accessed by that provider if needs be.

All the talk is about quick access — what about secure destruction?

So much discussion about records management is focused on storage and retrieval of information, that often the destruction of content at the end of its lifetime is overlooked. While destruction may be an afterthought for many, failure to manage and perform efficient and secure destruction can be extremely costly - not only in terms of potential legal costs for content that should have been destroyed, but also in terms of additional storage space taken up by content that could and should have been destroyed.

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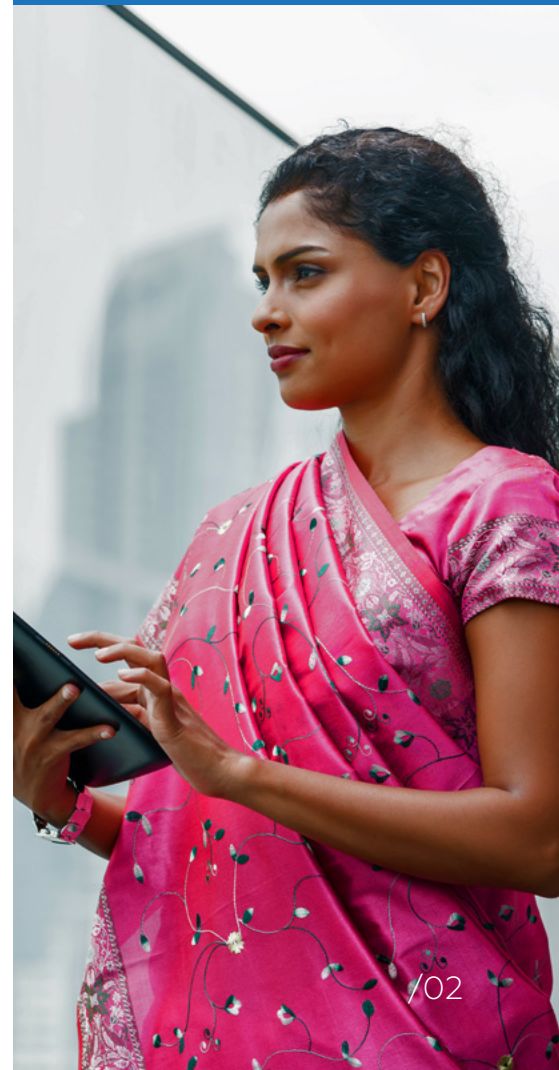
The deployment of an on-going retention and destruction policy requires diligence and very careful management, consistent adoption across the organization, dedicated staff and not insignificant cost. An outsourced records management provider is performing these operations for clients on a daily basis and can typically deliver these services at much less than the cost of an internal team while enforcing a tight chain of custody and delivering a defensible certificate of destruction to you.

Furthermore, on a practical level, how do you destroy documents internally? Take a little time to explore the managed document destruction capabilities of any NAID® certified outsourced records management provider – the volume, speed and completeness of physical document destruction performed daily by these organizations ensures that destruction is performed as thoroughly, quickly and cost-effectively as possible.

Is your metadata working for you?

Many records management systems, including the outsourced ones, allow users to search across both physical and electronic records from within their portal of choice – including Microsoft® SharePoint®. This is wonderful – as long as your meta-data entry policy is well defined and, even more importantly, well executed.

A lack of metadata , or even worse poorly or incorrectly entered metadata, on records causes significant problems when retrieving information – and often these issues are not discovered until many months later when speedy access, possibly as part of an e-discovery process, to the records are required.

A sometimes under-utilized benefit provided by outsourced record management organizations is not only to use them to provide physical storage of records, or provide web-based access to content, but to perform the laborious, yet vital, task of entering or correcting metadata against records. This not only removes the need for internal staffing but typically results in faster execution and lower error rates – primarily since the outsource will use better equipment and more experienced staff.

In conclusion

The above three areas focus on how an outsourced records management provider can add, often unrecognized, benefit to an organization and indeed recent research from AIIM (2013 Information Governance Industry Watch) has highlighted the desire from organizations to make more extensive use of these type of services. The research shows that 35% are already using their outsourced provider for physical storage with scan-on-retrieval facilities – with a further 25% considering their existing outsource provider to be in an ideal position to perform these services. In addition around 20% are using their outsource provider to perform volume scanning services, specifically with the results being sent back to their own internal records management system, thus making good use of outsourced metadata entry as described above.

It is obvious that the enterprise has high ambitions with respect to managing their records – much of it driven by the desire not to fall foul of compliance and governance regulation. What is also obvious is that an insular approach to developing records management capability is not necessarily the best route to take. Making use of an outsourced records management provider makes sense – whether to reduce on-site storage of paper, to provide industry-proven best-practices consulting, to provide volume scanning services or to manage the destruction of documents at the end of their lifetime, the outsource provider can, and should, become a logical extension of any internal records management team and strategy.

About the author

David Jones is a Market Analyst with the AIIM Market Intelligence Division. He has over 15 years' experience of working with users and vendors across a wide range of vertical markets. His experience has focused on taking complex technologies, such as data mining and document management, and developing them into commercial solutions largely in the retail, web and customer relationship management (CRM) areas. He has also worked as a consultant and analyst providing content management, information security, data mining, big data and business intelligence strategy and implementation solutions to clients such as Hewlett Packard, Fujitsu, Canon, BBC, SAP, Alfresco and Cisco. David has produced a number of AIIM survey reports on issues and drivers for Capture Solutions, SharePoint, Cloud Computing, Big Data and Social Business and has a BSc in Computer Science, CIP, ECMP and SharePoint.

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