



GETTING IT RIGHT FROM THE START

THE BASICS OF DIGITISING



A QUICK GUIDE TO HELP YOU PLAN, EXECUTE AND BENEFIT FROM A DIGITISING PROGRAM

Success in records and information management takes planning, organisation and a strategy for taking control of physical and digital records from creation, through active use to secure storage, permanent storage or planned destruction. Done well, records and information management will help your organisation limit information risk, manage costs and lay the foundation for big data analytics.

WHY DIGITISE?

Mismanaged information can slow down your processes, frustrate your customers and reduce efficiency. Not to mention burden your business with the cost of storing paper in premium-priced office space. Your records retention schedule and investment in secure offsite storage combined with intelligent digitising will give you access to the information you need when you need it. For many businesses, easy access to records from multiple sites is a necessity. From construction to R&D, HR to marketing, document sharing and collaboration are essential for business success.

WHERE IT STARTS

Before you begin your digitising project, assess what you want to achieve. Consider:

- > **Searchability/shareability** - physical records can be spread across systems, applications, departments, and locations. Information's ability to spread and change shape makes it extremely challenging and costly to find and access. Digitised

records in controlled repositories make it easier for people to access what they need when they need it.

- > **Process productivity** - frequently, companies don't have their records management processes and procedures under control. To counteract operational inefficiencies, look for work processes that make it easier or more efficient to convert paper to digital records.
- > **Reduced storage space** - physical records can take up expensive office space and, over time, slow down retrieval. Digitised records can free up valuable real estate and increase access. You can also store your files offsite to ensure that documents that are not digitised yet are not taking up valuable space onsite.

RECORDS RETENTION SCHEDULE

An enforceable records retention schedule will help your organisation keep records needed for legal, compliance and business reasons and let you know when they can be disposed of. A culture of keeping everything just in case can be expensive and deter efficiency.

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. Clearly, it isn't a matter of scanning every document in your archive and all the information that enters your business. Iron Mountain can help you solve complex records management problems and determine which documents are used infrequently and are right for deep storage. We also offer open-storage options to help you access documents you need to view frequently.

6 STEPS TO SUCCESSFUL DIGITISING

1. ASSESS THE SITUATION

Any digitising project for records management will start by establishing some basic facts. You will need to know:

- > 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

If a business process has already been digitised, find out how the process was planned and delivered. See if there are any lessons learned you can take advantage of. Is it working well? Is the capture

system effective? If you have no existing paper-free processes, select a trial carefully. You'll also need to review your policies and determine weaknesses in compliance. This can be a challenging process, but it can go much more smoothly if a partner like Iron Mountain is there to help.

2. DEFINE YOUR GOALS

A successful digitising project needs a clearly defined aim. Transformation does not happen at the flip of a switch or the click of a mouse. Working on one project at a time lets you plan for both costs and returns. 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. For some organisations, it could be speeding up customer service enquiries, so you will need to decide how to measure your goals as well. For other businesses, the goal could be increased document sharing and collaboration, so the measures will be entirely different.

3. EXAMINE MANUAL AND PAPER INTENSIVE PROCESSES

Work with people in business units to uncover how the process you've selected actually works - and where it's going wrong.

Find out where paper:

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

Your aim isn't just to scan the right documents, but also to reduce or stop the flow of paper into a process. Find out where the paper is coming from and develop a unified solution. Sometimes, it's not just about paper; it can also be about turning an electronic record back into paper for processing. Look at the process you want to transform carefully.

4. PRIORITISE JUDICIOUSLY

Determine the importance of each document so you scan what you need access to. This will 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 of the value digitising offers. And you'll also need to convince the people who use information in their jobs that digitising will benefit them. Work closely with both decision makers and records users to ensure you create and deliver a plan that's fit for purpose and makes a strong business case.

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

- > IT
- > Finance
- > Compliance
- > Legal
- > Procurement managers
- > Department managers

6. PLAN AND EVALUATE

Some businesses have hundreds of processes involving digital records. Look at the systems your business uses to capture information and consider the value of simplicity. The rationale for a single system that can service multiple processes across multiple sites is clear. Working with Iron Mountain will give you access to the latest thinking on digitising and the guidance of a trusted advisor.

CONTINUE THE PROGRESS

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 - that allows them to do their jobs. Organisations of all sizes and types should invest in digitising to progress now and in the future.

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