IRON MOUNTAIN®

A CHECKLIST FOR SUCCESS

WHAT TO DO BEFORE YOU DIGITIZE

SEVEN THINGS YOU CAN DO TO MAKE YOUR DIGITIZING PROJECT A SUCCESS

It makes good sense to digitize business processes that are clogged with paper. After all, fast and easy access to your information can speed up customer service, enhance document sharing and help people do their jobs more efficiently. But that doesn't mean digitizing will be easy or automatically successful.

1 .... **SELECT WITH CARE**

2 .... **DEFINE YOUR GOALS**

3 .... **BUILD A BUSINESS CASE**

4 .... **BUILD A TEAM**

5 .... **DIVIDE TO CONQUER**

6 .... **PUT PEOPLE FIRST**

7 .... **MANAGE YOUR VENDOR**

1: SELECT WITH CARE

Document your current businesses processes to determine where digitizing could increase efficiency and justify implementation. Choosing a single business process may be a good way to start. Keep in mind the cost of scanning a cubic foot of archive is about equivalent to storing that same foot for twenty years or so. You may decide to scan only new documents and those you retrieve frequently.

2: DEFINE YOUR GOALS

Determine why your company needs to capture information electronically and what you want to achieve by doing so. If your high-level business requirements, integration points and expected outcomes are clear, you'll be better able to define the functionality you want. While you focus on business goals, don't lose sight of regulatory requirements and the need to treat compliance as part of your plans.

3: BUILD A BUSINESS CASE

Sell your program in by building a business case aligned with your organization's priorities. Get senior management to support your plans and help to drive change. Define the role IT plays. Don't involve a vendor too soon.

4: BUILD A TEAM

Select a cross functional team with representatives from the business area, legal, IT and the community of end users. Communicate technologies, project milestones, the benefits that you can deliver as well as the changes and results that the business can expect. You're delivering a business solution, not just a technology. Involving people in change is crucial to your success.

5: DIVIDE TO CONQUER

Cleaning and grouping information is quite different from scanning a document – reason enough to uncouple the two. Make sure you have capacity to clean and group files before they are scanned. You may need a period of optimization following implementation. A 200-page Request for Proposal (RFP) won't guarantee your success, planning has an important role to play.

6: PUT PEOPLE FIRST

It's not enough to get a new tool onto a network. Focus on the user experience and make sure the metadata requirements are realistic. Tags, labels and other forms of metadata are key to locating the right document quickly. No one knows this better than the people who look for the organization's documents every day. This is why users should define the metadata. They should, of course, be guided by experts, but don't let the experts make all the decisions. Add training to your plans to encourage wider adoption. Take an informal approach by hosting a lunch-and-learn that allows people to experiment with a beta system.

7: MANAGE YOUR VENDOR

Involving a vendor too early in scanning and digitizing can be a distraction. Defining your project and your business needs before your vendor is involved will help you work together more effectively. Choose a vendor that's willing to schedule regular reviews to fine-tune adoption. Iron Mountain's services can be tailored to your needs and our teams have experience in scanning and digitizing projects for businesses of all sizes and types. You can combine our digitizing services with offsite records management for a cost-effective, holistic solution.

Find out more about digitizing with our short guide, Get it Right from the Start, the basics of digitizing. Or download our slides with the research and insight you need to present your business case for digitizing.

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