



"PEOPLE NATURALLY UNDERSTAND THAT THEY CAN'T KEEP EVERYTHING FOREVER...IT IS A MATTER OF TALKING THEM THROUGH THE PROCESS AND MAKING SURE THAT THEY UNDERSTOOD THAT WE WEREN'T TAKING WHAT THEY WANTED...INSTEAD, WE WERE TAKING WHAT THEY DIDN'T WANT, AND WE WERE DOING IT WITH THEIR AGREEMENT."

- MATT MCMAHAN,  
SENIOR MANAGER,  
BUSINESS CONTINUITY  
AND RECORDS

## CASE STUDY

# TAKING THE ROAD LESS TRAVELLED TO RECORDS MANAGEMENT

## REACHED A CROSSROADS ON YOUR VOYAGE TO BETTER RIM SYSTEMS? TRY FORGING YOUR OWN PATH.

Matt McMahan, Senior Manager of Business Continuity and Records at Texas Roadhouse, is a records management trailblazer.

Texas Roadhouse is an international restaurant chain with more than 500 locations in the United States and 14 international locations. The restaurant is defined by its motto of "Legendary Food, Legendary Service." Known for their hand-cut steaks, homemade sides and fresh baked bread Texas Roadhouse serves "from-scratch" meals with care in a friendly atmosphere.

McMahan began his career with Texas Roadhouse as an attorney and was instrumental in establishing the company's retention policy. This process involved extensive interviews and legal research, as well as the development of detailed retention schedules for the vast amounts of paper housed in Texas Roadhouse's many locations. His background meant that taking full ownership of the records management function was a natural fit. He assumed his current role in February of 2013 and has spent the last three years as a dedicated driving force towards radically improved records management.

## A FEW BUMPS IN THE ROAD

Because restaurants are designed to serve food and not store records, management of paper documents at the

store level is challenging. In fact, many restaurants struggled under massive volumes of paper documents, including: receipts, personnel records, computer-generated reports, invoices, and old training materials. These documents consumed valuable restaurant real estate that could be dedicated to more productive purposes.

McMahan and his team were able to obtain executive support for a visionary plan to bring about a complete records management overhaul at the restaurant level; this support was cross-functional and included representatives from the Legal, Risk, and People (HR) departments. With this backing, McMahan was able to plan a nationwide project to boost records management awareness and address the goliath backlog of paper records being stored in restaurants.

McMahan was aware that a records management project at this scale wasn't going to be easy. For this plan to work in the long-term McMahan needed every restaurant to understand the changes he was putting in place and to help the restaurants follow the retention schedule going forward. To do so, McMahan decided to take his management plan on the road.



## CONSTRUCTION AHEAD

Over the course of three years McMahan developed and implemented an innovative records management process that re-imagined his company's old, ad hoc system through an ambitious project called "Two Roadies and a Truck" (Roadies is the nickname for Texas Roadhouse employees).

The plan involved a series of multi-city tours in which McMahan would personally rent a truck and travel to various Texas Roadhouse restaurants. During these trips McMahan would meet and work directly with restaurant operators. Before he arrived McMahan set the stage with each restaurant's Managing Partner (restaurant manager) by explaining his ultimate goal to separate business "trash from treasure" and that he would personally help the restaurant sort through and organize their paperwork. This hands-on approach put the Managing Partners' minds at ease, earned their respect and brought records management to the forefront of the company culture.

Getting the Managing Partners to understand and support the new system was just step one. McMahan knew that once all the records were sorted the "trash" would need to be safely destroyed and the "treasure" securely stowed. Before "Two Roadies and a Truck" could get rolling, Texas Roadhouse would need a business partner to ride shotgun on this unique road trip.

## ROADSIDE ASSISTANCE

How would Texas Roadhouse find an associate that would support this new plan? Was there a RIM expert that could accommodate McMahan's cutting-edge ideas while still giving him independent control? A little curbside assistance provided the answer.

Iron Mountain readily agreed to help by offering affordable storage and/or disposal of any and all paper materials. With so many facilities spread out across the country, Iron Mountain trucks would be on call and able to pick up hundreds of boxes of records

at any of Texas Roadhouse's locations and drop them off at regional storage facilities. In addition, if McMahan preferred to deliver boxes to an Iron Mountain location himself, flexible Iron Mountain scheduling allowed him to drop off materials on his own. "No other vendors would have been able to handle our plan in a way that made sense," McMahan said, adding, "We did a thorough vetting of several companies and Iron Mountain was the one that we chose...based on its footprint and on cost. It was the only option where we wouldn't have to ship hundreds or thousands of boxes to a central facility."

## REACHING THE ULTIMATE DESTINATION

After maintaining a rigorous travel schedule for three years, McMahan completed the project in 2016. Personally delivered records management was something no one at the restaurants had seen or expected. This changed the paradigm of how Texas Roadhouse's records management program was perceived, and enabled it to become a partner to business operations. As a result of the partnership between McMahan and Iron Mountain valuable real estate has been freed up, important documents are more secure, and the Managing Partners have one less concern to distract them from "Legendary Food, Legendary Service."

In total, McMahan's road trips yielded a whopping 380,000 pounds of paper that was later processed for secure shredding with Iron Mountain. During that time he also oversaw the collection of more than 1,700 letter/ legal boxes of records that he delivered to Iron Mountain's facilities for safe storage.

McMahan's one-of-a-kind business model—a blend of insourcing, outsourcing and old-fashioned ingenuity—is an example of how to make records and information management relevant and accessible to the entire business.

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