IRON MOUNTAIN®

A CHECKLIST FOR SUCCESS

WHAT TO DO BEFORE YOU DIGITISE

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

1. SELECT WITH CARE
Document your current business processes to determine where digitising 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 metre of archive is about equivalent to storing that same metre for twenty years, so you may decide to only scan 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 organisation's priorities. Get senior management to support your plans and help to drive change. Define the role IT plays.

4. BUILD A TEAM
Select a cross functional team with representatives from across the business 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 AND 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 optimisation 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 organisation'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 PARTNER
Defining your project and your business needs before your partner is involved will help you work together more effectively. Choose a partner 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 digitising projects for businesses of all sizes and types. You can combine our digitising services with off-site records management for a cost-effective and holistic solution.

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