Restore
Information Management

How we can help you get **digital ready**

A step-by-step guide

By Stefan Chetty, Sales Director

The digital journey

Going digital is always in the news but where does the digital journey actually begin?

By Stefan Chetty

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For many businesses, the process is a daunting one and they often make the mistake of trying to do it all at once.

But our advice is that the journey should begin with getting your physical records right.

At Restore Information Management we help customers consider the physical and digital together – and guide them through the process.

The bottom line is that if you are planning to digitise paper records, then if you don't get your physical right, you probably won't get your digital right either. In fact, you can end up spending a lot of money that you don't need to.

What's frustrating is that optimising physical records and storage is often not seen as part of the digital journey. But it should be. It's the first rung of the digital ladder and it's crucial.

If you go straight to digital in a hurry, there's a real danger of moving a problem you have with physical files into digital platforms instead.

So, whether you already use our services to host your physical inventory or are simply looking for help from an expert, it's time to talk.

Our step-by-step guide to starting the digital journey:

It would be easy to think the best way to go digital is to scan every single record and get going straight away.

In reality, that's a highly expensive and inefficient way to do it. By only scanning documents and files you regularly need to retrieve, it's possible to reduce costs and improve efficiency. And that process starts with the physical inventory – and with outsourcing to a records management expert.

Step 1:
Understand what you already have got

There are some big questions to ask before the journey begins, not least understanding what records you store, where you store them, how much they cost and what processes are in place to look after them.

What condition are they in? What are they used for? Which documents are used regularly, and which are rarely retrieved?

For instance, you might have a file of 200 pages, but only two or three of those are ever needed. Understanding which documents are most critical will help you decide which ones to scan in future.

Step 2:
Know how long you are going to keep documents for

Retention policies are crucial to optimising inventories and can help inform whether you scan or not.

Every file should be allocated a retention date, which may be based on a legal requirement, specific legislation or your own retention policy/guidelines.

That information is vital when starting the digital journey. After all, if a file is due to be destroyed in the next two years, it may not be of value to scan it.

We can advise businesses on retention schedules, which is a complex area. There are legal reasons why some documents need to be kept longer, especially health records in the NHS, for instance, or legal papers.

GDPR compliance is a big issue here, too.

Many files containing personal data (in the HR department, perhaps) must be destroyed by a set date to comply with data protection rules.

Other files, particularly of interest to the public, may need to be redacted, with sections blanked out prior to release due to the confidentiality of the contents.

It's down to businesses to set their own rules around how long documents are kept. But we can help by formalising and standardising your business rules and activating them.

Step 3:
Analyse which files are retrieved most often

Do you know how often individual files are retrieved?

In our experience, companies don't have robust stats at hand – and that's a problem when it comes to starting the digital journey.

At Restore Information Management, through data capture and barcode tracking of all items, we can identify which files are most often requested – and produce a cost/benefit analysis to suggest which should be scanned and which left in physical storage (until the end of their retention period).

Starting the digital journey may be as easy as moving your physical files out of storage in the office and into secure storage at Restore.

Or if you are already a customer, think about the extra value you get from a records management which is an expert in physical to digital.

Step 4:
Think about how to reduce your inventory

Reducing your inventory now can create instant savings – and also make it cheaper to go digital in future.

This could include:

> Destroying files that are beyond their retention date

> Destroying physical versions of documents that have been scanned or digitised

> Reviewing content and slimming down files over time, only retaining relevant information

Restore can advise on and deliver all of these services directly, without outsourcing any element. This can be done as project work or spread over time to suit your needs.

The golden rule is to minimise the physical before scanning anything.

The important thing here is that if you destroy records now and don't take them on the journey, going digital will be easier and cheaper in future.

Destruction is a vital part of that policy, so it's worth considering whether you even need to keep a physical original once it has been scanned.

But as long as you scan to the right accreditation – BS10008 – then that's a legally admissible document in a court of law. This gives you the ability to destroy the original paper record.

Digital journey goals:

› Save money

› Improve user experience

› Reduce inventory

› Going entirely digital for the future

Step 5:
Understand your business goals before you go any further

Knowing why you are starting the digital journey and what you want to achieve is crucial.

Some businesses simply want to save money, so the focus might be on moving records offsite and reducing the inventory.

Others want to improve the experience for end users, so the scanning of regularly retrieved files to provide quick access is the focus. Our work with HM Land Registry, where files with a lease were chosen for scanning to make them easier to access, is a great example.

Others want to reduce their inventory now, in order to facilitate going digital in future.

Our work with the Department of Work and Pensions is another good example – where we audited their files to help decide what to keep and what to destroy. We reduced their holdings by half, providing the opportunity to make it cost-effective to move 13 million files into off-site storage.

Others are heavily focused on going entirely digital with an ambition to only create digital records in future.

We will assess your requirements and use our expertise to suggest solutions and options based on what is important to you. Whatever your business goal, Restore Information Management is here to help.

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Contact

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restore.co.uk/informationmanagement