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Group

Getting Digital Ready

Your Step-by-Step Blueprint for Records Management

Digitisation offers a multifaceted approach to addressing environmental sustainability and operational challenges. By reducing paper consumption, businesses can significantly minimise waste and conserve natural resources. Moreover, the transition to digital workflows streamlines internal processes, enhances efficiency, and fosters a more sustainable business environment.

Are you ready for your digital transformation?

Traditional records management means dealing with mountains of paperwork. As most of us know through experience, physical documents are often misplaced or lost and are vulnerable to incidents such as workplace fires. Also, physical record keeping is time-consuming, expensive, and can create compliance loopholes.

However, getting ready for digital transformation can seem daunting. Digitising paper documents seems like a Herculean task. However, once completed, it streamlines your recordkeeping and bumps up productivity and data security. This whitepaper highlights the importance of digital records management and takes you through a systematic approach to digital transformation.

1 # Understanding your current record management landscape

People often think that digital transformation entails scanning, capturing and categorising every document in a company. This approach is, however, counter-productive because you don't need a virtual version of every single sheet of paper. Get your business digital ready by first assessing your specific needs and pinpointing any challenges.

Conducting an inventory

A comprehensive audit of all your business documents is essential for identifying, categorising, and assessing their retention requirements. During this audit, it is important to:

- Identify all record types, such as invoices, legal dockets and human resources (HR) documents.
- Categorise all identified documents. Determine which documents you use most and what you use them for.
- Determine the retention requirements for each category or sub-categories.

Identifying critical records

A core facet of your assessment is pinpointing your critical records. This includes confidential data, HR documents, financials, legal papers and intellectual property (IP). Investigate secure means of digitisation before jumping in.

Determining the retrieval frequency of documents – how often a document is used and by whom – is crucial. Few companies actively plot document retrieval frequency in their day-to-day operations. A records management partner helps your business with these insights and identifies the documents that must be digitised.

Retention periods

Document retention periods refer to the length of time you keep (or legally have to keep) documents. Your company must have a record retention policy that aligns with the relevant legislation. This in turn informs and prioritises your digital data transformation and management processes. To ensure that you cover all bases, look at the required retention periods of:

- Contracts.

- Financial reports and tax-related records.

- HR records.

- Data protection records. You should also consider the EU's General Data Protection Regulation (GDPR) here. It deals with gathering, processing, storing and sharing personal data.

Developing your digital transformation strategy

Many think that digital transformation entails paying out for expensive hardware and software and capturing every last document in virtual form as quickly as possible. This approach is haphazard and serves little purpose. Getting digital ready – establishing a clear plan with objectives – makes this transformation efficient and meaningful.

Assessing current processes

Assess your current document management strategy, including key aspects such as document generation, storage, and disposal methods. It is important to identify gaps in your present practices, such as time-consuming methods or cost inefficiencies that impact your productivity and bottom lines. Use digitisation to eliminate or trim these.

Analyse the workflows involved in your document management strategy. Pinpoint operations you can discard and highlight important ones such as generating, reviewing and signing off purchase orders. Bespoke digitisation helps you incorporate important workflows into your document transformation strategy.

Building your business goals

Before diving into digital transformation, you must clearly define your business targets – what you want to achieve with your document digitisation strategy. For example, if increased customer satisfaction is a key performance indicator (KPI), accessibility and speedy response times are core goals in your digitisation strategy.

Remember to monitor your digital strategy's return on investment (ROI). This involves the routine measurement of how much money you save and setting goals for future savings. Generation and costs of paper waste versus reduction after digitisation is one of these measurable benchmarks.

Choosing to keep it in-house or outsource

You can either manage digitisation in-house or partner with a professional document management partner. It is crucial to choose the right one!

Weigh up the pros and cons of keeping digitisation in-house or outsourcing to experts such as Shredall SDS Group. Think about things such as time efficiency, shredding services, scanning and data security. We offer records management consultancy services to help you assess and identify the best course of action.

3 Reducing your records inventory

Once you have assessed your current systems, identified issues and devised a plan, it is time to start the digitisation process.

Scan and index your documents

Document digitisation entails capturing your documents digitally by scanning and indexing your documents. Initially, this process is labour intensive, but with proper indexing (categorisation) and systematic implementation, it will run smoothly. Ultimately, digitisation saves time and money while underpinning your company's eco-conscious efforts.

Prepare documents by ensuring that they are complete and removing all paper clips or staples to prevent damage. For large volumes, a high-speed scanner does the trick. Once scanned, you can index and save your documents to a cloud platform. Choose secure cloud storage with integrated access controls. The Shredall SDS Group document management software provides an all-in-one solution for data digitisation.

Send records for destruction

More often than not, companies sit with mountains of unnecessary paperwork. By reducing your document inventory, you can realise immediate savings. Before scanning your documents, destroy the following:

- Those with lapsed retention dates.

- Those that have been scanned and captured. This saves space and reduces on-site fire risks.

- Those that are not relevant. You can gradually reduce these as digitisation becomes part of your day-to-day operations.

Data security is an important consideration when destroying documents. Partner with a trusted document management expert to shred your redundant documents without risking confidential information and brand compromise. Take a look at the certificate of destruction and document destruction security measures that Shredall SDS Group offers.

4 Ongoing management and optimisation

Your digital document strategy is not a one-off exercise. Sustained success requires continued monitoring and adaptations where necessary.

Performance monitoring

To ensure a successful digital transformation, it's imperative to closely monitor the performance of your digitised systems. This involves tracking key performance indicators (KPIs) aligned with your overall business objectives. By regularly evaluating the performance of your digital solutions, you can identify areas for improvement, measure progress towards your goals, and make data-driven decisions to optimise your digital strategy.

Scalability is also a critical factor in the success of digitization. Your digital systems must be able to adapt, grow, and change to accommodate the evolving needs of your business. As your organisation expands and your requirements change, your digital infrastructure should be able to scale accordingly without compromising performance or security.

Regular updates and maintenance

To protect your digital data and ensure the optimal performance of your systems, it is essential to implement a robust maintenance schedule. Regular updates, patches, and security fixes are crucial for safeguarding your data against vulnerabilities and threats. It's crucial to also develop procedures for backing up your data regularly, both locally and to secure cloud storage.

Incorporate these maintenance activities into your overall digital management strategy to minimise risks and maintain the integrity of your information.

Maintaining a robust data security and maintenance regimen can be challenging due to evolving threats and complex technological landscapes; partnering with a total information management partner can offer the expertise, resources, and ongoing support necessary to ensure the protection and integrity of your valuable information.

Shredall SDS Group helps you assess your requirements and establish initial and ongoing management processes. You can rely on us to pave the way for your digital transformation. With over 27 years of industry experience, Shredall SDS Group is an award-winning and accredited document management strategist you can trust. Contact us today to discuss your unique requirements.