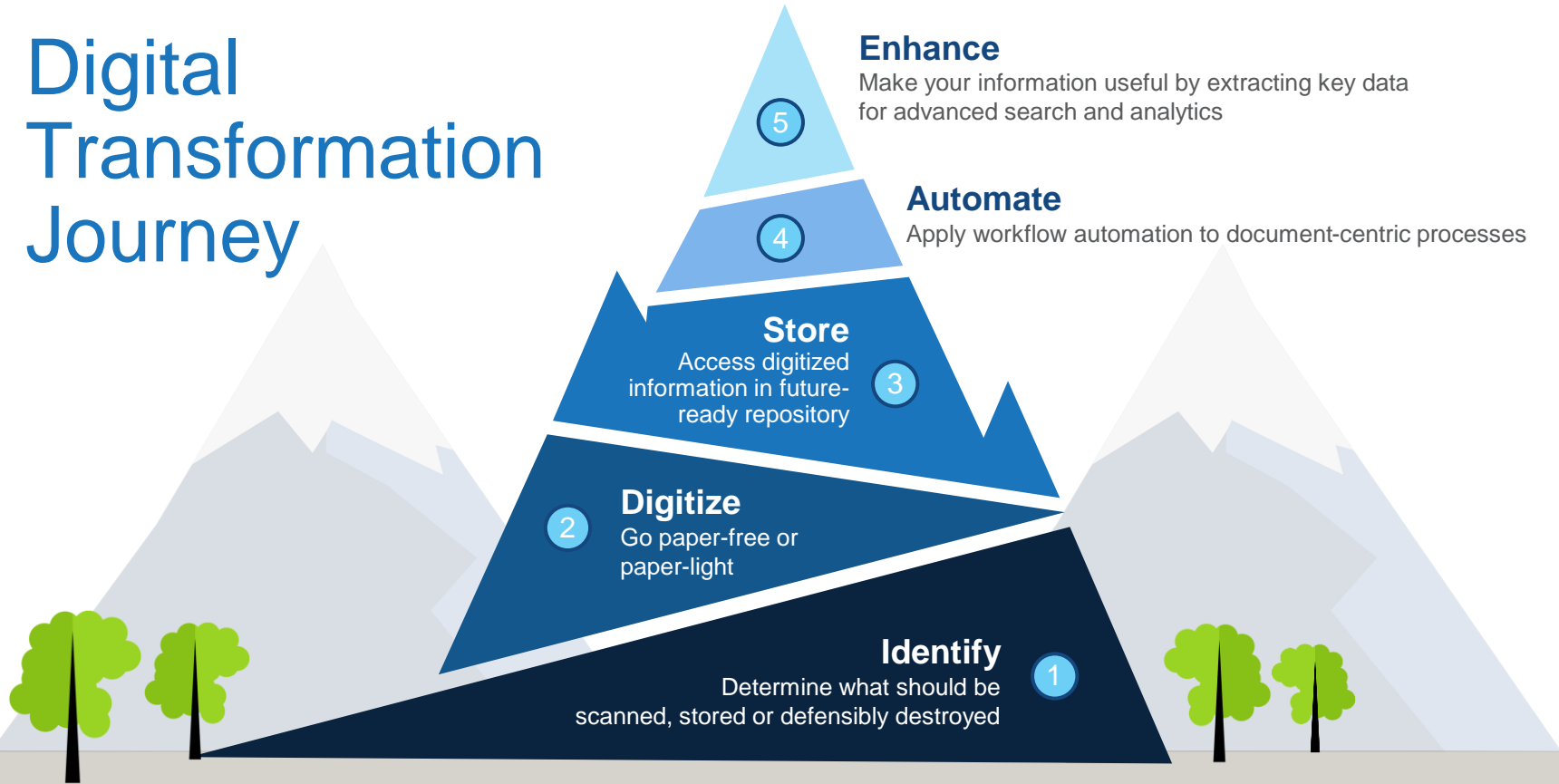


The Journey to Zero Box



Digital Transformation Journey



The “Last Mile” Why Now?

A new way of thinking

Pandemic has changed how and where we work

- Work from home
- Hybrid work
- Office reconfiguration or closure

Less paper

- Limited access
- Reduced dependence
- Inability to print

**92% of leaders
implementing
clean-up**
(51% pre-pandemic + 41%
since pandemic)

Increased Mergers, Acquisitions and Divestiture activity

Increased investment in resilience



Clean Up Opportunities

Within our power: Spring Cleaning

Tackling what you left behind in the office 2 years ago!

- Approach your office space with a new frame of mind
- Develop a strategy for tackling your file drawers and cabinets
- Weed out non-records that you've kept "just in case"
- Review official business records to determine retention requirements
- Decide what should be imaged
- Decide what should be boxed and stored offsite
- Take inventory of unused IT equipment
- Destroy paper/equipment per your Policy
- Share your success with others



The age-old challenge: legacy boxes

Missing or inadequate metadata

Lack of ownership

Complex authorization process

No designated final approver

Blanket holds

No budget or people



Is paper really a requirement?

Out of date RRS

Missing retention codes to calculate eligibility

Co-mingled files

Event-based retention rules

No destruction after imaging

Multiple locations

Proven practices: fundamentals

- Know locations, on and off-site
- Access to inventory of boxes/files
- Up-to-date Records Retention Schedule
- Strategy and/or policy to guide approval/decision-making
- Policy for secure destruction methods
- Strategy to determine what is imaged, or not
- List of current legal holds
- Destruction eligibility reports from vendor

Institutional desire to reduce risk and free up \$ for investments in DX, WX, resilience, innovation, resources and more...

Where to begin?

Adequate metadata/descriptive information exists

- Inactive (versus active status) records
- High risk / low risk records
- High potential records - AI/ML, data analytics, monetization
- Create date retention rules (versus event date)
- Age - many years in storage
- Use - last retrieval far in the past
- Indication of potential MAD activity
- Planned real estate changes



Engage with receptive LOBs, functions or individuals

What's left?

Partial or inadequate metadata/descriptive information exists

- Active or inactive status records
- Co-mingled box content (dates, record types)
- Pesky event based retention rules

Options:

- Programming to connect RRS to boxes (department/function, dates)
- Lifting lids:
 - Sampling
 - Manual effort to classify and organize
 - Programming to connect files to databases (doc id, dates)

- Image
- Keep in physical format
- Archive
 - historical
 - cultural
 - evidential
- Destroy



Managing the “unclaimed”

We don't know
what's in the
box

CIRCULAR REASONING
WORKS BECAUSE

But we need to
keep it “just in
case”

It's time to break the cycle!

Global financial institution with thousands of unclaimed boxes

Partnered with Legal to agree on repeatable approach for disposition *without requiring approval*

- Selected a representative group of boxes (not on hold)
- Lifted lids
- Identified
 - record types
 - age
 - source
- Aggregated and reported results
- Gained permission to destroy (or archive, if deemed historical)
- Agreed on documented process for continued clean-up



Seize the opportunity for zero box!

Engage stakeholders

Leverage selling points:

- Goal of execs to implement clean-up
- ROI in 12 - 18 months
- Essential step in the DX journey

Create a plan

Engage experienced vendors - no need to DIY

Budget for this year and beyond

Execute

Measure, document and report success!



Thank you!

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Why image?

- Ease of access
- Shared content
- Use in data analytics
- Use in ML/AI - anonymized or not
- Monetization



Strategy for destruction of paper after imaging!