

# WHAT THE PANDEMIC TAUGHT US ABOUT RIM MANAGED SERVICES

Needless to say, the pandemic has changed how many companies conduct business. The move to hybrid work environments, with personnel working from home, won't end when Covid does.

Changes in records and information management (RIM) are inevitable as employees require remote access to documentation. Digitization, ease of access to records and information security will be at the top of the RIM to-do list in the post-pandemic era. Budget and staffing restrictions, along with overcoming resistance to change, will also be important concerns as companies adjust to the new normal.

To understand today's challenges, Access invited RIM professionals who were members of ARMA to participate in a survey. **The 332 professionals who responded covered a broad spectrum of responsibilities in information management (Chart 1).**

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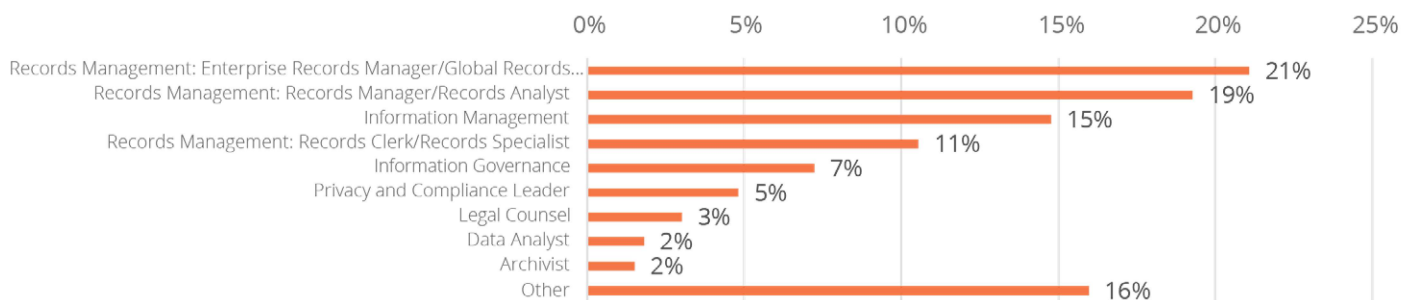
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Chart 1: Job Function of Survey Respondents

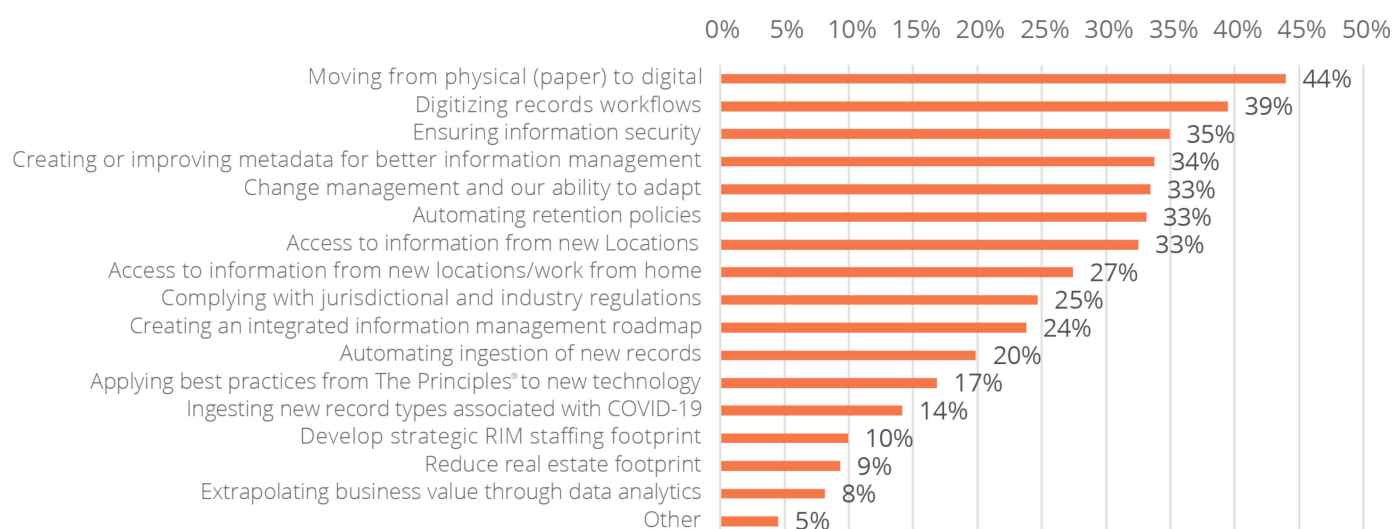


## 1. Greatest Information Management Challenges

According to our survey, the most pressing challenges (Chart 2) that RIM professionals are facing in the next 12 to 24 months are:



**Chart 2: What challenges are you seeking to address in the next 12-24 months? (check all that apply)**



### Digitizing records is not just scanning

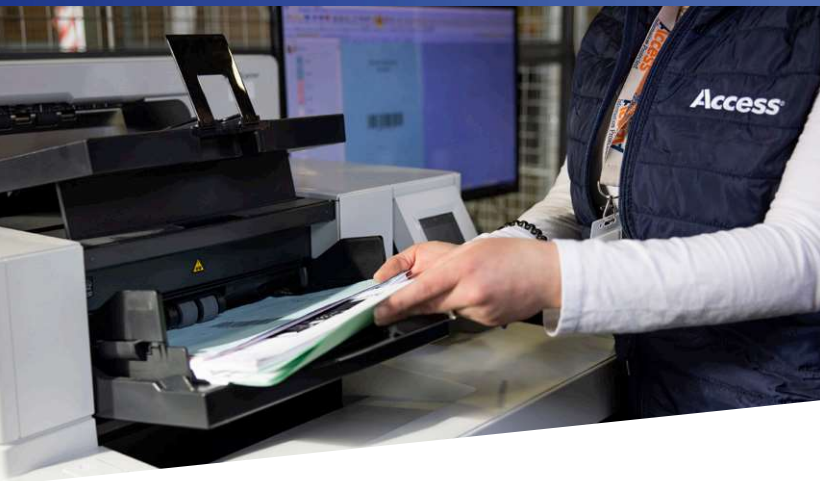
The top challenges mentioned, Moving from Paper to Digital and Digitizing Records Workflows, follow core industry trends towards digital transformation. This industry trend was well underway before the pandemic and has only intensified as a direct result of employees working from home.

RIM professionals are, of course, fully aware that the move to digital is a complex process that involves a lot more than scanning records. The components of a successful digitization program most frequently mentioned by survey respondents include Information Security, Records Organization, Change Management and Automated Retention Policies.

### Information security is even more critical with increased digitization

If records in physical form are locked away in an onsite records room or in a box in offsite storage, they are fairly secure. Someone would have to understand what they're looking for in the first place, break in, and find a document in maybe 65 million cubic feet of records. All in all, a pretty daunting task.

While it may be easier to find digitized information, properly securing it is much more complex. An experienced managed services company can ensure information security, whether cloud-based or not, tailor a digitization strategy based on individual needs and avoid missteps that could threaten security.



What companies need to focus on is filing digital documents the right way, so that users can actually find what they are looking for.

## Organizing and labeling digital content is critical

Now that many of their employees are working from home, some companies have decided to go digital simply by scanning everything as a unit. The contents haven't been separated out, labeled and properly organized. It may not be paper anymore, but it's hardly a digital transformation if the information can't easily be searched for or found.

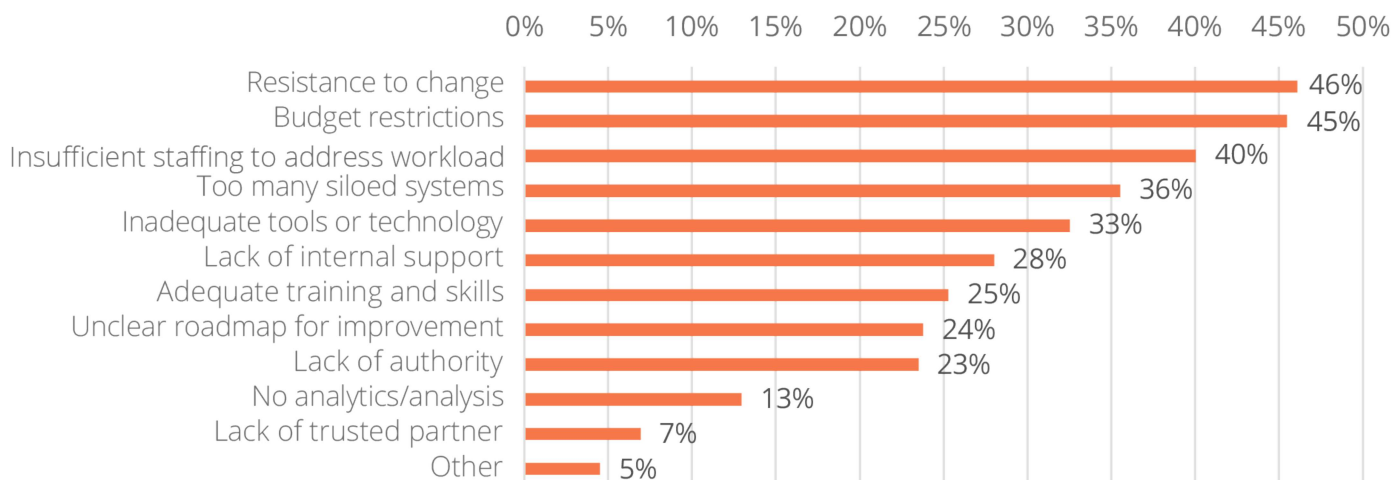
What companies need to focus on is filing digital documents the right way, so that users can actually find what they are looking for. Creating and Improving the Metadata was listed as one of the major challenges in our survey.

## 2. Impediments to Achieving Information Management Goals

Respondents were also asked what impediments to achieving their records and information management goals concerned them most. The three most important records management challenges respondents are seeking to address in the next 12 to 24 months are:



**Chart 3: What impediments to achieving your records and information management goals are you concerned about? (check all that apply)**



## Resistance to change is a major stumbling block

A successful records digitization program requires even more than scanning, securing and organizing records—it requires changing behavior so people stop printing records, become accustomed to working with digitally-born records, and create new processes and workflows that eliminate the use of paper altogether.

At Access we see this unwillingness to change consistently across industries. To address this problem, companies need to implement a solution that is tailored to their organization, fitting hand in glove into an ecosystem that already exists. Relying on experts who have managed digitization initiatives with multiple companies will help ensure that the implementation process minimizes the behavioral changes needed, thus minimizing the amount of training required.

The best strategy to overcome user reluctance is for companies to organize digital documents the same way they already organize physical information. This strategy will provide a smoother path to the ultimate digitization goal while minimizing disruption for the end user. This ability to minimize change is a key to Access' success in implementing digitization programs.

The change management component of a digital transformation initiative is even more difficult with staff who come from a paper heritage than with younger employees who grew up in the digital age. The generation now entering the workforce is seeking a digital work environment. Paper-based companies are a bit of a turnoff to them—and that creates a real challenge in attracting that next generation. For example, even within the traditionally conservative legal profession, our clients have commented that younger attorneys are naturally digitally oriented, and the dependency on paper is aging out of the system as older attorneys retire.

## Budget restrictions also impede digitization

Another major barrier to achieving information management goals is budget restriction. There is a general perception among companies that they are already spending too much on records management, much of it related to off-site storage fees. Many organizations are skeptical about investing in digitization, believing that they will just be throwing good money after bad.

The solution is to develop a holistic integrated information management program that can improve outcomes while offering savings. Such a program is often a combination of automating global retention policies and schedules that work across digital and paper records systems, storing archival or inactive records offsite with planned destruction, and digitizing active records for efficient use, especially as more workers are remote.

## Staffing is insufficient to handle workload

Fully 40% of survey respondents listed the problem of insufficient staffing to address the records management workload—a problem that is pretty consistent across all industries. Outsourcing some records management functions to a company that provides a seamless service can, in the long run, end up saving both time and money.

Outsourcing with a partner who can provide a long-term roadmap and skilled project management can accelerate modernizing your program through guided decision-making about retention and storage of archival records vs. digitization and management of active records. The correct staffing levels can be adjusted through the outsourced model to jumpstart and maintain the project without hiring additional full-time staff.

### 3. Expected RIM Program Changes Pre- vs. Post-Pandemic

Respondents were asked several questions:

1. Think about your records and information program prior to the pandemic (Jan. 2018 - Jan. 2020). Please reflect upon the following RIM related solutions and classify them based on how your organization did, or did not, utilize them.
2. Think about the upcoming 12-24 months (2021 - 2022). Please reflect upon how you will be moving forward with your RIM related solutions.

#### Reduce off-site storage and shredding

A comparison of responses to the first two questions indicates that the records and information program related solutions that are expected to change the most are Offsite Storage and Shredding—a not unexpected 12% reduction in both active programs. The desire to reduce budget could be the driver for the expected reduction in these programs.

#### Increase retention management

Expected reductions in offsite storage and shredding could explain why Cloud Retention Schedule Management Solutions are expected to experience the greatest increase (+13%). One way to reduce offsite storage costs is to put retention policies in place.

#### Increase digitization services

Also expected to increase are Autoclassification Tools (+11%), supporting the understanding that scanning isn't enough. Documents need to be organized and tagged so they are findable and, therefore, usable.

The three additional solutions that are expected to increase are also related to digitization: Digital Mailroom/Virtual Mailroom, Digitization Projects: Ongoing/Recurring and Business Process Digitization are all expected to increase by 5%.

Chart 4: Expected Difference in RIM Program Services Pre- and Post-Pandemic	Pre-Pandemic Active Participation	Post-Pandemic Purchasing/ Continuing Contract	% CHANGE
Cloud Retention Schedule Management Solutions	22%	35%	+13%
Autoclassification Tools	9%	20%	+11%
Digital Mailroom/Virtual Mailroom	13%	20%	+11%
Digitization Projects: Ongoing/Recurring	49%	17%	+5%
Business process digitization	30%	35%	+2%
Digitization Projects: Backfile	34%	36%	+2%
Enterprise content Management (ECM)	42%	43%	+1%
Scan on Demand/Image on Demand	53%	50%	-3%
Digital document repository	61%	58%	-3%
Offsite storage	75%	63%	-12%
Shredding	85%	73%	-12%





As firms return to work, they are considering reducing office space by as much as 50% compared to pre-pandemic times.

## 4. Outsourced Managed Services: A Post-Pandemic Solution

Traditionally a paper/physical media storage and logistics company, Access is responding to client needs in the post-pandemic world and transforming our business to offer managed services that help companies modernize their information management programs through digital transformation, auto-classification, automated retention policy application, and outsourced records and information management programs.

### A cost-effective solution to support the hybrid work environment

The survey responses underscore the need for outsourced RIM managed services. As firms return to work, they are considering fully remote or hybrid office solutions, such as two days a week in the office and three remote. Many are thinking about the cost advantages of redrawing and reducing their office space square footage per full-time equivalent (FTE) by as much as 50% compared to pre-pandemic times. Records rooms are part of the real estate square footage that can be reduced.

Key to implementing a remote or hybrid environment is having the ability to respond to requests for files from staff who split their time between working at home and in the office. Outsourced managed services are cost-effective options to support these needs. For example, currently Access takes records that are archived, puts them in a box, and stores them securely. Our new managed service allows companies to also outsource active files so they are managed offsite. Additionally, a managed services company can implement digital delivery or scan on demand to support both remote and on-site staff.

### A solution to mitigate resistance to record digitization

By having a managed services company respond to digital delivery of requests for files, organizations can also reduce resistance to change related to digitization. It's vital for the managed services company to integrate tightly with systems the staff already use to order records from storage or access digital records. Employees can transition seamlessly to a digital workflow even when the documents they seek were born on paper.

## Summary

Our survey results indicate that change is afoot in the traditionally slow-changing world of physical records and information management. The global pandemic appears to be the catalyst that will finally push companies to implement changes that will help them achieve the digital transformation goals they identified over a decade ago.

We see managed services as the clear path forward for transforming the records and information management function from an in-house hybrid physical/digital model to a fully digital model. RIM experts will securely manage the project and roadmap, apply AI autoclassification to digitization processes for precise access to records across all systems, and implement automated global retention policies across the entire program to minimize risk and defensibly destroy.

Companies willing to outsource all the physical components of their RIM programs to managed services experts will accelerate their digital transformation process. In addition, they will gain greater control, reduce risk and maximize cost efficiencies.

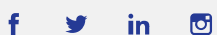


To find out how Access can help your business, contact our team today at **1.877.345.3546** or visit us online at **[AccessCorp.com/contact-us](https://AccessCorp.com/contact-us)**.



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### About Access

Access is the largest privately-held records and information management services provider worldwide, with operations across the United States, Canada, Central and South America. Access provides transformative services, expertise, and technologies to make organizations more efficient and more compliant. Access helps companies manage and activate their critical business information through offsite storage and information governance services, scanning and digital transformation solutions, document management software including CartaHR, CartaDC and CartaDC Essentials, and secure destruction services. For 11 consecutive years, Access has been named to the Inc. 5000, the ranking of fastest-growing private companies in the U.S.