

# Files & Flexibility

A guide to information management and business flexibility



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Always more.

# We always offer you more.

## Enhancing information management for greater working flexibility

The ability to provide tailored, flexible services for clients is becoming increasingly important across all industry sectors.

Companies can no longer rely on static points of difference or competitive advantage to ensure profitability in perpetuity. Savvy organisations must instead constantly heed the wishes of their customers — and their employees — in order to stay productive and competitive. Information management solutions play a big role in helping businesses maintain this flexibility, which is crucial for both attracting customers and retaining good staff.

One of the most important tenets of a flexible organisation is a workforce that is not tied to their desks or any other fixed location. Many organisations may be reluctant to embrace more flexible working arrangements for their staff due to customer perceptions. However, as former lawyer Judith Bennett notes, “research in 2015 by Victorian Women Lawyers (VWL) shows that, contrary to myths, clients see it as irrelevant whether their lawyers work flexibly (and government and in-house clients often have flexible work practices in their own workplaces). Clients focus on the skills and quality of the legal service provider, the cost and the result.”<sup>1</sup> Information management strategy can make a significant impact in this area. When information assets are hard to find, siloed within individual departments, or exclusively paper-based, the ability of staff to move freely about and access data from locations of their choice is severely limited.

<sup>1</sup> <https://www.liv.asn.au/Staying-Informed/LIJ/LIJ/August-2016/Practice-management--Flexibility-and-the-modern-fi>

Another angle on organisational flexibility is the extent to which employees are able to perform tasks outside of their core area of expertise. The more efficiently and broadly that information is disseminated, the more effectively that employees can take up slack in areas beyond their normal responsibilities. "For employers, having employees willing to step outside their job description means they can get more accomplished with workers who are able to take on more responsibilities, do different tasks, and do more at work," says Alison Berry of The Balance. "It also means, that the employer doesn't have to persuade employees to take on more work. Flexible employees are willing to do whatever is necessary to get the task accomplished or the job done."<sup>2</sup> The right information management strategy is essential for ensuring employees are as flexible as possible in their roles.

Clients are also putting increasing pressure on businesses to be flexible. "Customer experience processes... should not be maps providing one route only that must be followed at all costs," writes Christian Remy for CustomerGauge, "but instead they should provide multiple routes."<sup>3</sup> Client expectations of flexibility come in many forms. For example, modern customers expect that businesses will provide multiple channels for communication, that services will be available across a wide variety of platforms and outside of regular business hours, and that media will be shared in compatible formats. Whether or not an organisation can meet these demands largely depends on the quality of its information management, as a solid paper-based or ICT information management system will provide the internal dexterity required in order to meet the external flexibility requirements.

Fortunately, professional information management providers are capable of fully supporting businesses with a range of complementary solutions designed to enhance flexibility.

The best information management providers enhance workforce flexibility through digitisation, making an organisation's existing archives available to employees remotely without compromising on security. For any archived paper documents that need to be accessed in a hurry, a good information management partner will also provide a scan-on-demand service, allowing staff to request virtually any document from anywhere in the world and have it delivered in under three hours.

**The ultimate benefit of making information assets as easily accessible externally as they are in the office is that employees will enjoy better work-life balance — and be more likely to stay with a company for the long term.**

In terms of flexibility of job roles, centralising information assets with a reputable information management provider clarifies much of the confusion that can result from ambiguous information custody within organisations.

<sup>2</sup> <https://www.thebalance.com/workplace-flexibility-definition-with-examples-2059699>

<sup>3</sup> <https://customergauge.com/news/why-your-customer-experience-process-needs-flexibility/>

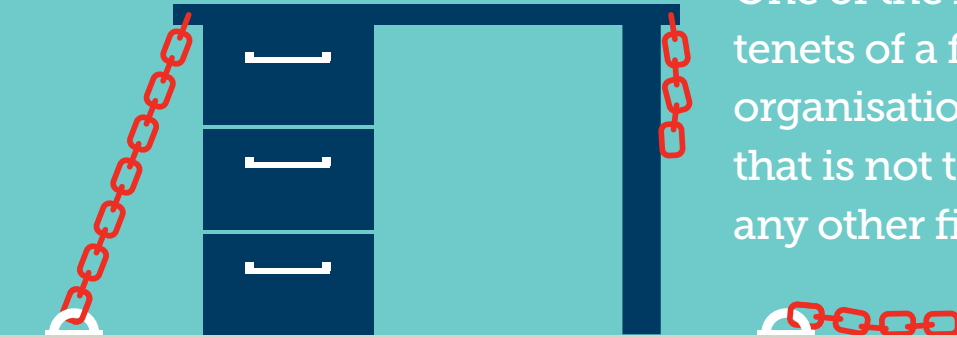
When archives are moved off-site, they can also be simultaneously audited, indexed and made searchable in responsive ICT systems, so that information can be located rapidly without the need to hunt down a particular custodian. When an organisation's workforce has fast and easy access to information, employees can become more adaptable and capable of performing tasks outside of their job description, which increases their confidence as well as providing overall efficiency and profitability benefits to the company as a whole.

Finally, a good information management solution can help organisations dramatically enhance the flexibility — and quality — of their customer service. The best providers are capable of transporting and transmitting information at any time of the day or night, with electronic access systems that work a wide range of devices, can display assets in over 250 native file types, and deliver in a wide range of document formats. This allows organisations to pass information on to clients without the need for time-consuming conversions. Multiple users are also able to access the same documents at once, increasing the speed with which client information can be processed and the ease of collaboration by different client points of contact. Meanwhile, intuitive web-

based security eases admin overheads, so organisations can be confident that only authorised parties are accessing information, that they are doing it quickly, and with less costly manpower.

**The end result of an information management solution that supports customer service flexibility is a more competent workforce, higher productivity, and greater customer satisfaction.**

Flexibility is only one of many considerations for organisations looking for a better information management solution. Read on to discover other challenges — and how a good information management partner can help overcome them.



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## Other important considerations in information management

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### • Compliance

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One of the most important parts of compliance is information retention. But done poorly it can be a great burden to both compliance and other important considerations in information flows. The biggest issue across the board is “infinite retention”, which organisations can resort to in an attempt to ensure compliance without having to attend to specific guidelines for each document type. There are several downsides to this, however, including the difficulty of effectively indexing the resulting bloated archives, the cost of storing many years of unnecessary files, and paradoxical compliance violations that arise from the inability to find relevant information.

**Infinite retention can also place organisations in violation of the Privacy Act due to personnel files being retained past their period of usefulness.**



A good information management partner makes compliance a simple matter. Archives can be initially audited, then properly indexed for easy content visibility. Destruction is arranged for redundant or unnecessary files to limit the number of files being stored, while sentencing schedules are set up for the rest in line with the relevant legislation. As files reach the end of their lifespan, a good information management partner will initiate two-factor authentication before destroying anything, and provide a certificate of destruction after information has been physically shredded or electronically degaussed.

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### • Security

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Security is a growing concern for many organisations. While the online era has been a boon for those dealing with large amounts of data, it has also fostered the development of a new illicit marketplace for both digital and paper-based information due to the ease of duplication and dissemination. While many organisations, like finance companies, have a unique incentive to keep their information safe due to the tremendous costs involved in a breach, others such as healthcare providers and government agencies can lag behind due to complex decision-making processes, tight budgets, and a greater focus on core competencies.

By centralising their data with a competent information management partner, organisations can increase the safety of their information while limiting the amount of money spent on security in-house. Moving physical archives off-site eliminates human access to anything not officially requested by the information owner or company representative.

With client-anonymous indexing, unauthorised parties are prevented from discovering what an archive contains — not even the fully police-checked staff of the information management company.



When being transported, documents stay within an unbroken chain of custody, limiting the risk of loss or breach during handovers. In terms of cyber security, good information management partners also provide an administrative console with airtight security configurations, function-level verification, and application-level safeguards that limit users to accessing only the functionality and data they need.

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## Discovery

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Time spent in discovery — or collecting the information necessary to properly address a client issue — is an important consideration for many organisations. While many businesses continue to bill their clients for discovery, an increasing number are choosing not to as a way to gain competitive advantage. In both cases, information management plays a key role in profitability. When discovery hours are billable, organisations must ensure they have fast and efficient access to information assets in order to avoid ultimately externalising the costs of their own disorganisation. When discovery is a complimentary service, businesses have an incentive to make information as accessible and well organised as possible so that non-billable hours are kept to an absolute minimum.

Using a quality information management partner can help make information easier to search for and faster to retrieve. These companies provide excellent indexing systems that are searchable using highly responsive cloud-based tools. As well as saving organisations the trouble and expense of manually searching through archives, speedy physical and electronic retrieval helps cut down on lost time.

To make it easy for organisations to externalise the costs of discovery where appropriate, good information management providers can also create sub-accounts in their billing systems, so that all storage and retrieval actions are itemised under the case they pertain to.

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## Value & Variety

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Many organisations avoid information management providers completely because they have limited money to spend on non-core services. Others may engage a third-party information management solution but not know how to make the most of the money they are spending on it. Organisations will often engage multiple service providers for everything from cleaning to office relocations to asset storage to renovations, and end up spending excessively as a result. This is a common problem in industries where budgets are difficult to keep under control and cost overruns are common.

The best information management companies do far more than just store and retrieve information. They can tailor a package that integrates a wide range of non-core offerings covering everything from small office refits to the relocation of entire industrial worksites. Consolidating multiple services with a single provider not only increases value for money, but assists with central organisation. For example, if a room full of paper files needs to be audited and archived, shelving needs to be dismantled and disposed of, and then the same space needs to be set up as an office using fittings and equipment relocated from another location, a provider with an integrated offering can arrange the entire process internally — eliminating the need for an organisation to dedicate its own resources to coordinating multiple individual contractors.

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## Hard copy

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Even in our era of always-on connectivity and versatile electronic devices, paper still plays an important role in many industry sectors. Lawyers, for example, still require wet signatures on contracts, while in

construction paper remains the most efficient way to visualise and collaborate on project designs. For paper-based businesses, many information management providers can place a lot of emphasis on digitisation and electronic information retrieval, but do not provide sufficient support for paper workflows.

**The biggest issues that paper-based businesses deal with are the challenges of organising hard copies efficiently, sharing information quickly, and ensuring documents are archived appropriately for compliance purposes.**



The best-equipped information management providers support a complete range of hard copy indexing, storage and retrieval needs. They can provide fast, secure transport and archiving solutions for paper documents that span the entire nation, with client-anonymous indexing solutions that make retrieval quick and easy through intuitive ICT systems. They also use an unbroken chain of custody to transfer documents twice daily as standard, and even faster through scan-on-demand technology that can electronically deliver images of paper archives anywhere in the world in a matter of hours. Top-quality information management providers also handle secure destruction of paper documents, both according to pre-arranged schedules and on demand.

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### • Customisation

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Every business is different. And that means that every information management solution needs to be different too. The cookie-cutter archiving and indexing systems provided by some information management companies can leave organisations dealing with workflow interruptions or even paying for services they

don't need. A financial services company wanting to put their in-house files in storage, for example, may find it difficult to find a provider who can simultaneously audit those files for compliance purposes and then digitise them using existing in-house indexing conventions. Or a construction company with paper-based workflows may find itself using a provider with a digital focus that cannot efficiently transfer important hard copies between different worksites.

Engaging a high-quality customised information management partner means not having to compromise. The best solutions will seamlessly integrate with existing processes, employing indexing and retrieval systems that use an organisation's internal filing references and native terminology to limit the learning curve for staff. Storage can be customised for hard copy or digitisation — or a combination of both — with the option to audit archives as they are stored and set up destruction schedules at the same time. Good information management companies provide a range of retrieval choices also, including on-site pick-up, rapid dispatch in their own fleet of GPS-tracked vehicles, and even urgent scanning and electronic transmission of physically stored documents.



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# The Grace Advantage

With over 50 years in the business, Grace is uniquely qualified to deliver excellence in information management.

Grace provides solutions for a full range of information management requirements, from storage and indexing to retrieval and destruction. Here are the advantages your organisation will enjoy with Grace:

- Expert consultants to assess the precise needs of your business and tailor solutions that address your specific information management challenges.
- The speed, convenience and security of 26 information management centres across the country – more than any other provider.
- Many facilities are protected by state-of-the-art safety systems, including sprinklers and fire doors – all linked directly to the local fire brigade. Plus, electronic intruder detection with back-to-base alarms.
- Complete and customisable cataloguing, indexing and sentencing solutions for projects of any size, right across the country – with information management software that gives you total control.
- A scanning and digitisation process to make searching and retrieval as fast as possible. Digital files are audited to ensure 100% accuracy, and can be delivered in any electronic format.
- Fast and flexible retrieval, with the capacity to deliver documents twice per day as standard, urgent scan-on-demand services that respond within just 3 hours, and the option to personally retrieve information on site.
- The only secure chain of custody in the industry that spans the entire country. With GPS-tracked vehicles and police-checked staff, your documents never leave Grace's sight. Their client-anonymous indexing system also ensures your confidentiality at all times.
- Real-time tracking of your documents, from anywhere in the world.
- Secure destruction of documents, either on schedule or on demand, under a strict authorisation process – protecting against both accidental data loss and unnecessary storage terms.
- Innovative solutions that recruit Grace's commercial and fine-art removals expertise to cater to a wide variety of unique business requirements.

**Contact Grace today to find out how their specialised information management solutions and integrated services can help you. Visit [www.grace.com.au/contact-us](http://www.grace.com.au/contact-us) for your nearest office.**

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