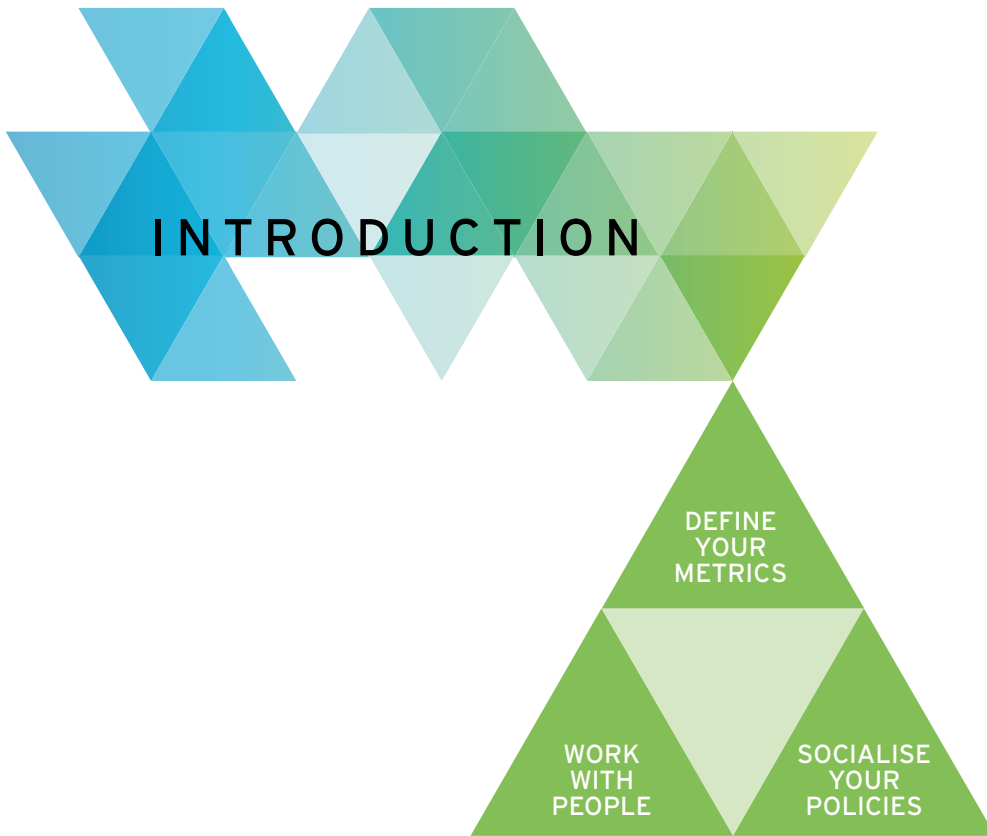


SEE INFORMATION  
**DIFFERENTLY**

# HOW TO PROMOTE INFORMATION RESPONSIBILITY



THREE WAYS TO ENCOURAGE EVERYONE TO UNDERSTAND AND  
TAKE RESPONSIBILITY FOR MANAGING RECORDS AND INFORMATION



## THREE WAYS TO ENCOURAGE EVERYONE TO UNDERSTAND AND TAKE RESPONSIBILITY FOR MANAGING RECORDS AND INFORMATION

Not every aspect of records management is an opportunity to experiment with your latest stand-up comedy routine. But that doesn't change one important fact: your records retention schedule is essential to the health of your records management programme and the well-being of your business. A solid strategy, considered planning and clear goals will all be essential to your success.

But there's another challenge you should take into account: the people all around you. If they actively support your programme, you stand a much greater chance of success. How can you engage people in contributing to information management to ensure you reach goals?



## DEFINE YOUR METRICS

It's easy to find yourself defending your programme to senior executives and the people around you. But Information leaders as well as stewards should be clear and confident; never reticent or uncertain. By agreeing what you're measuring and how you're measuring it, you'll be able to explain to your colleagues in business terms why behaviours need to change. You'll also be able to demonstrate value during a budgetary review.

Key Performance Indicators (KPIs) will demonstrate and measure your progress. When you define your records management KPIs, consider:

- ▶▶ **KPIs SHOULD ALIGN WITH YOUR PLANNED OBJECTIVES**
- ▶▶ **KPIs SHOULD BE REALISTIC**
- ▶▶ **STEPS TO YOUR KPIs SHOULD BE ACTIONABLE**

An example of what this could look like:

# RECORDS AND INFORMATION MANAGEMENT KEY PERFORMANCE INDICATORS

## GROWTH



% Net Growth (Decline)  
Year-over-Year

Total storage volume (Cuft, TB, etc.)  
vs. prior year

% Added, last 12 months

Aggregate volume (Cuft, TB, etc.) added over  
last 12 months vs. beginning of period

## DISPOSITION



% Destroyed,  
last 12 months

Aggregate volume (Cuft, TB, etc.) destroyed  
over last 12 months vs. beginning of period

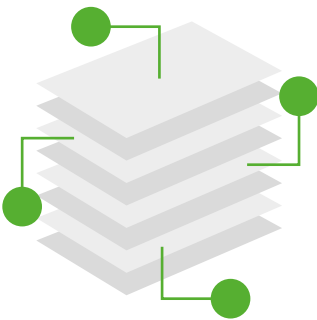
% Eligible for  
Destruction

Storage volume (cartons, files, TB, etc.) past  
retention date vs. overall storage volume.

% with Destruction  
Review Date

Storage volume (Cartons, files, documents,  
etc.) with a retention date assigned  
vs. overall storage volume

## META-DATA



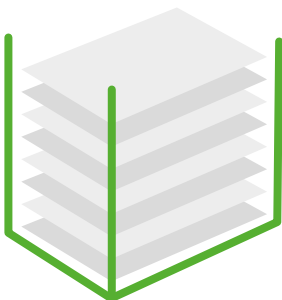
% Not Classified

Number of records (Boxes, files,  
documents, etc.) without records code  
vs. total content volume

% Not Classified,  
No Primary Meta-data

Number of records (Boxes, files, documents,  
etc.) without records code, ownership or  
description vs. total content volume

## INVENTORY STATUS



% on Hold

Storage volume (Cuft, TB, etc.) on hold  
vs. total inventory

% of Inventory Out  
> 60 days

Number of boxes out for more than 60 days  
vs. total number of boxes in out status.  
[Is there an electronic equivalent?]



## WORK WITH PEOPLE

Records retention and disposition is based on policy. And policy is a formal business process. Develop awareness and training materials that are tailored to different business areas. You'll get a better sense of what works and what doesn't. Training isn't a perfect science, and you may find that some people are happy to attend online training, while others will need a conventional course. For example, customer service teams may benefit from more formal training on managing customer information followed by regular refreshers while other business areas will need a lighter touch.

Keep in mind:

- ▶▶ **TRANSITION PROCESSES ARE IMPORTANT**
- ▶▶ **YOU NEED PEOPLE IN EACH BUSINESS AREA TO ACT AS INFORMATION STEWARDS**
- ▶▶ **DON'T TRY TO TRANSFORM EVERYTHING AT ONCE**

PEOPLE CHANGE JOBS AND YOU SHOULD STAY IN TOUCH WITH KEY MANAGERS TO OFFER MORE TRAINING

A SOLID STRATEGY,  
CONSIDERED PLANNING  
AND CLEAR GOALS WILL  
ALL BE ESSENTIAL TO  
YOUR SUCCESS.



BUT THERE'S ANOTHER  
CHALLENGE YOU SHOULD  
TAKE INTO ACCOUNT:

**THE PEOPLE ALL  
AROUND YOU.**



# SOCIALISE YOUR POLICIES

Policies are the bedrock of planning.

And communication is the foundation of change. But the simple truth is that you can tell people things, but whether they're paying attention is another matter. At every point in your awareness and education programme, make what you're trying to achieve and why you're trying to achieve it as relevant and human as possible. Reminding people what fines for non-compliance can cost your business and that records past their retention period take up space and clog up business processes - and expose you to privacy regulation violations - could be important.

Make the case that records retention is relevant and responsibility rests with people as well as processes.

▶▶ **START DURING EMPLOYEE ORIENTATION**

▶▶ **ENGAGE MANAGERS**

▶▶ **REMEMBER YOUR TEAMS HAVE DIFFERENT LEARNING STYLES**



## ONCE YOUR TEAMS ARE ENGAGED WITH YOUR IDEAS, YOU CAN TRY DIFFERENT FORMS OF EDUCATION.

- ▶▶ By all means use your intranet to host your records retention guidelines, but don't forget to ask people to visit it.
- ▶▶ Emails can help, but consider getting people's attention in other ways. For example, create a mouse mat with a mini retention schedule and a web address.
- ▶▶ An employee acknowledgement form can help you to gauge and track people's responses.
- ▶▶ There's no reason you can't publicise records management policy through a witty poster, a coffee cup or just a laminated factsheet.

## HUMOUR AND RELEVANCE CAN DRAW ATTENTION TO YOUR CONCERNS AND REMIND PEOPLE THAT RECORDS RETENTION IS IMPORTANT.



## For more details and guidance, download our complete records retention guide

Find out more about the value of records retentions  
schedules by using one of our ROI calculators

### Get in touch now

Call us: 08445 607 080

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INFORMATION IS EVERYTHING

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R.O.I 1800 732 673 | N.I. 08445 60 70 80 | [ironmountain.ie](http://ironmountain.ie)  
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