From project support to outsourcing, TDS services include:

- Digitization of Documents: on-site or off-site

- Near-Site Document Storage Facility

- File Relocation Services

- Proven records and information management processes that deliver ROI

- Purpose-built document management solutions

- Records and Information Governance Consulting

For more information on how TDS can help your organization, reach out to us at **1-866-785-3853** or visit us:

Total Document Solutions, Inc.

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TDS-20-OGPL1

CASE STUDY:

TDS Substantially Reduces Paper Footprint for Colorado Midstream Company

THE CHALLENGE

A Colorado Midstream Company engaged TDS to transform their working environment to be substantially less dependent on paper. The TDS team – comprised of subject matter experts (SMEs) in Energy Records Management – possesses over 50 years of combined experience providing expert digital conversion services and consultancy in Information Governance. TDS provides expert solutions and experience supporting migration from paper-based environments to virtually electronic for numerous clients in the energy sector.

THE SOLUTION

In the design and implementation of the "less paper" initiative and transition to electronic records management, it was most effective to first address the future state and work backwards. Transition to this future state consisted of two primary tasks: Policy & Procedure development and Training & Education. Several items pertaining to policy and procedure were agreed upon prior to implementation. As with all aspects of this initiative, end-user input was critical to success, and therefore these policy items had to be carefully considered:

- **Official Record** - The client established the electronic file as the "official" record, and after filed in the document repository, all printed copies are considered transitory and treated as such, unless exempt by policy.

- **Minimizing printing** - Because it is not feasible to prevent all printing, it was most effective to have a dialogue with end users on what gets printed and why, and discuss how much of this printing could be eliminated by changing workflows or work habits. These conversations stressed the point that when documents come into the organization electronically, they were saved and profiled in the document repository, and future documents received in hard copy are to be scanned and destroyed, with exceptions as set out in the company's RIM policy (i.e. wet signatures, recorded originals, etc.)

- **Naming conventions** – Because continuity and accessibility were objectives of this initiative, a standard naming convention for electronic documents was established by department.

- **Document types** – The list of available document types – by department - in the document repository was revised to be broad enough to accommodate all departments, but general enough that the list was navigable where users did not default to a "miscellaneous" category.

- **Folder types** – End-users' comfort level with working in an electronic environment often required that the electronic environment mirror the familiar world of paper as much as possible, particularly for tenured staff. To this end, establishment of standard folder types for each department in the document repository was essential.

- **Document Repository** - The future state of "less paper" centered largely on broad adoption and utilization of the document repository. Achieving a high adoption and utilization rates required collaboration with IT personnel on several application features as well as individualized training for end users.

- **Privacy and Security** – A number of the digital documents in the repository contained personally identifiable information ("PII"): social security numbers, W-9's, etc. It was essential only certain staff with appropriate permissions were provided access. It further enabled the Midstream Company to demonstrate adherence to obligations associated with information-related statues.

EXECUTION

End-user input was critical to the success of the "less paper" transition and as such, the team worked closely with those end-users from various departments to identify additional training needs. Change management was a critical component of this project. To aid in this, collaboration with and engaging feedback from end-users was crucial. The goal was to improve information access – whether on-site or working remotely. Understanding how knowledge workers used information in their day-to-day roles ensured those principles were mirrored in the new system.

> *"Our organization dramatically increased efficiencies by being able to find **what** we need **when** we need it. During a recent audit, our team assembled the requested information in record time, thereby minimizing the time auditors spent in our office. All this allows us to focus on the business of running our business."*
>
> *- - Director of Operations*

RESULTS

TDS continues to be a trusted advisor for the company's electronic records management initiative. Key factors critical for success included buy-in from upper management, the appropriate software solution for the company's environment, and IT resources committed to developing and delivering essential training necessary for end-users to succeed in the new, electronic environment. ▪