

Filing for Efficiency

In this information age the amount of data an organisation manages grows every day. The need for efficient document management policies is more important than ever, says Andrew Jackson, in both public and private sector organisations

EVERY ORGANISATION possesses information that is a strategic asset. Employers consistently claim that their employees are their most important asset; however, the importance of information cannot be underestimated. Without it an organisation would find it difficult or impossible to operate. Information has a very high value equal to or in many cases exceeding the value of staff or capital assets.

Most corporate knowledge is shared either in conversation or through documents: paper, electronic or multimedia. The need for efficient and flexible data storage is one of the most prevalent issues facing managers today. The need to protect data against loss or disruption is more important than ever.

Twenty years ago only a limited amount of information was digital and large amounts of information were held on paper in an unstructured format. While the amount of digital information we produce, consume and ignore increases exponentially every year, the amount of paper stored is also increasing. Far from creating a paperless office, the information overload has increased the amount of paper churned out by an estimated 20 per cent a year.

All significant information in an organisation regardless of its purpose should be properly identified and considered an asset of the business. Many organisations are not harnessing or exploiting information or in some cases not protecting them from loss or theft.

A white paper produced by BT in 2004 looking at data storage highlights the fact that data security is not just an internal issue, but that there are a number of external expectations placed upon an organisation:

- Customers expect supplies and services to continue – or resume rapidly – in all situations
- Shareholders expect management control to remain operational through any crisis
- Employees expect both their lives and livelihoods to be protected
- Suppliers expect their revenue streams to continue
- Regulatory agencies expect their requirements to be met, regardless of circumstances
- Insurance companies expect due care to be exercised.

The need to store data is also being driven by regulation with the health and financial sectors being particularly affected.

Many organisations especially in the public sector have produced their own records management policy. However policies also need to be supported by more detailed guides and a programme of staff training and communication.

Typically policies should set clear objectives and aim to:

- Meet the needs of business
- Define responsibility
- Provide staff resources, knowledge, competences and management procedures
- Operate procedures that confirm applicable legislative requirements
- Addresses obligations under the Freedom of Information legislation.

Once a policy is agreed it then must be implemented. Making sure all staff are aware of legislation and regulations governing information. The organisation should review information required at each stage of each process in its business to ensure necessary and sufficient information is available as required for effective operation and not more.

HSBC

Too much information could be as bad or worse as not enough. The relocation of 8,000 HSBC staff to their new Canary Wharf location brought with it a number of challenges including the streamlining of its document management systems. This resulted in a 70 per cent reduction in filing from an average 6.5 linear meters per person down to 2 linear meters. All paper filing systems were standardised, leading to a dramatic reduction in the volume of material stored.

HSBC achieved a 70 per cent reduction in its filing for its move to Canary Wharf





The electronic office has brought with it a degree of empowerment to HSBC employees as processes have become simplified and automated. Data storage and other company policy information are available on the company intranet to answer any problems employees may come across, freeing up managers time.

The creation of one electronic standard format has meant that fewer cabinets are required and therefore faster document retrieval, plus an increase in general productivity is achieved. More efficient filing systems are said to result in up to 50 per cent faster retrieval times and anything from a 30-60 per cent reduction in floor space. With floor space costing anything from £100 to £500 savings can be substantial.



The Home Office

A study was carried out on the London Headquarters building for the Home Office back in 1991 assessing its workspace efficiency. The study concluded that the building was so wasteful in its use of space that all 3,500 staff working in it could be rehoused in a medium-rise building, taking up just two-thirds of the city block.

The 1960s Marsham Street high rise slabs came down in 2002-03 and construction of the Home Office, housing approximately 3,000 staff,



Retrieval of information required under the Freedom of Information and Data Protection legislation made particular demands on information storage when the Home Office moved to its new Marsham Street HQ (far top); the filing solutions were supplied by Triumph Business Systems (above)

was completed earlier this year. Although the new building has been well received by staff it is not just their needs that need to be taken into consideration, especially when undertaking a move of this scale.

Like all Government offices document storage is critically important for the Home Office. A complete storage audit was carried out on the building to assess what levels of storage were required. The sheer volume of paperwork that the Home Office are responsible for called for a sophisticated storage solution, this was put into place by Triumph Business Systems.

The Home Office is required to keep records on file for long periods of time, much of which is highly confidential. Solutions were found to match the storage needs of archive information, for storing information that is regularly accessed by both large and small groups of people, and of course for the individual storage needs of staff.

Significant to the storage of information has been the introduction of the Freedom of Information Act on 1 January 2005. This gives anybody the right to access information held by public authorities including Central Government. Members of the public now have a right to access information held by the Home Office. The Data Protection Act 1998 governs the processing of personal data (information relating to living individuals). This legislation makes it possible for members of the public to request access to personal data that the Home Office may hold about them. Efficient retrieval of information is essential for the Home Office, and was an integral factor in the process of relocation.

Ultimately the retention of data is only part of the overall storage picture. The real value of data lies in the use that can be made of it. While documents preserve knowledge for future reuse and sharing, organisations also need to capture the way things are done in the organisation. There is no point managing information if it is not needed or the right information cannot be retrieved at the right time or in the right format to meet the requirements of the business.

Organisations need to analyse what information or data they need and at what stage in each process. An efficient data management policy should be ongoing and fundamental to all business processes, and to meeting objectives.

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