

Imperial Oil

Business Issue:

How to move an enormous collection of critical physical documents from Toronto to Calgary while maintaining the security and accessibility of documents at every stage of the move.

Customer Profile



If you've ever had to move your office, your business or even your home, you know what a challenging task it can be. So it isn't hard to imagine what a massive undertaking it was for Imperial Oil to move its head office from Toronto to Calgary.

Files are not Furniture

The enormous collection of physical documents held by Imperial Oil Ltd. was the largest component of the move and presented a major challenge. It was critical to IOL that the security and accessibility of its documents be maintained at every stage of the move – files would not be treated like furniture. Recognizing this, IOL's head office move team chose to partner with a provider that could help them execute a seamless move from start to finish.

After an extensive search, IOL retained TAB Products of Canada, Co. to oversee the file moves of several groups, including the Executive, Treasury, Occupational Health and Human Resources. TAB's unique approach to a move of this scale is embodied in what it calls the "Pack, Track and Move" methodology, a fusion of strategic document management disciplines with on-site design and moving expertise. TAB's approach brought a true "end-to-end" solution to the move, and made them a perfect fit for IOL's existing plan.

In the Big Picture

The key to implementing TAB's end-to-end methodology was knowing exactly what IOL had, where it was, and when it was moving. Led by Colleen Moretti, VP of Consulting and Outsourcing Solutions, the TAB team met with IOL's Information Management Supervisor Barb Landes, Corporate Secretariat Bob Taylor-Vaisey and their team for file room design and move planning sessions.

The team started by undertaking a survey of both the Calgary and Toronto offices to create a detailed picture of every file and piece of

equipment. Landes, Taylor-Vaisey, and their team familiarized TAB with IOL's classification structure and the Management & Protection of Information (MPI) system, helping them to identify what security levels and restricted access would be necessary during packing, moving and unpacking. TAB's experts identified other factors that would affect the physical layout of the file areas, including the necessary "re-stack" of the existing Calgary space and future growth. This gave them the metrics needed to work with the design team in preparing the Calgary site in terms of storage space, ergonomic flow and security.

So that no unnecessary files were moved, TAB and the Toronto IOL teams implemented a file reduction exercise called "TAB SMART" (Streamline. Manage. Access. Retain. Toss.) once the planning sessions were complete. This resulted in the destruction of unneeded documents and let the move team focus on the essentials.

On Track

TAB employed their comprehensive tracking and audit system to ensure all files arrived when and where they had to, while remaining accessible to IOL as much as possible. When the Pack, Track and Move teams deployed in both Toronto and Calgary, every file and file bin was packed, sealed and tagged with a barcode according to their MPI ratings, using different colour codes for security levels, and then recorded using TAB's FILETRACKER software. This allowed for the creation of detailed independent manifests which the TAB team used to audit each load.

The manifests were then turned over to IOL personnel before the files and equipment were loaded onto the trucks. IOL staff then performed their own audit and signed off on the load for proper bar-coding and security. This two-tiered audit system was a fundamental part of the end-to-end approach as it provided a "double check" to confirm accuracy and consistency. For particularly sensitive files, when requested TAB team members remained onsite until loading was complete.

The manifests were then faxed to TAB's Calgary team so they knew exactly what was coming. This allowed them to install

the equipment and unload the files according to the blueprint developed in the initial strategy and design sessions. This flow of information, together with the constant communication between all elements of the TAB and IOL teams was critical to the efficient execution of the move.

Getting There

As a result of IOL's organization and planning, and TAB's tested move methodology, the move was a huge success, completed both on time and according to plan. IOL's Toronto staff were able to leave their offices on Friday afternoon and start work on Monday morning in Calgary, never missing a beat. Not a single file was misplaced or lost.

It was, according to Taylor-Vaisey, like "magic". He said, "TAB's management team and work crews are exceptional; accommodating, business-like and creative. They were able to think on the fly and solve problems as they came up. One of TAB's strengths is the flexibility of their methodology. They were quick to determine alternatives and identify better information management techniques without a hard sell, just good suggestions."

The strength of TAB's methodologies and depth of records management experience combined with the skill and competence of the entire IOL Head Office Move Team to make this massive project a complete success. Both sides continue to enjoy working together on finding solutions for IOL's records management needs.

IOL MOVE STATS

• 100	tons of paper shredded
• 9,000	bins moved
• 11,800	total items moved
• 6,000	hours driven
• 138,600	km traveled
• 32	different scheduled moves
• \$160,000	saved in shipping by shredding unnecessary files



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