

TAB Needs Assessment

Digital Needs



Considering digital imaging as part of your RM program? How do you know if it is right for you? How quickly can you expect to see ROI? What things do you need to consider?

Answering the following questions will help you:

- Understand how your current filing system is structured
- Assess whether or not a move to digital imaging is the right option for your organization, and
- Understand what might be involved in such a move

After you have reviewed the questions and considered your answers, contact us to learn more about how digital imaging can help you simplify information access, storage and retrieval, reduce costs and provide your enterprise with greater flexibility.

Your Imaging Objectives

1. Do you currently use imaging in any capacity in your environment? You need to understand your current context before starting any new projects.

2. What are the top reasons you are considering an imaging project? For example, do you want:

Storage efficiency (space/management/archiving/backup)

Improved information retrieval and access

Streamlined workflow

Enhanced collaboration

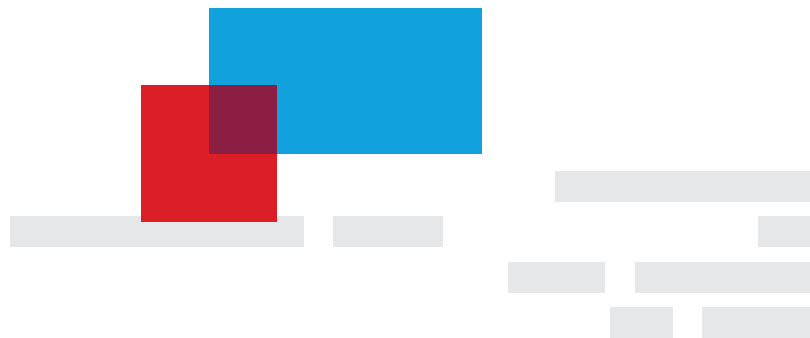
Improved tracking capabilities

Compliance support

Augment our disaster recovery/business continuity plan

Improved customer service

Other



Your Current Filing Environment

1. How large is your filing system?
What is your organization's total current number of:

Active Records Onsite

Active Records Offsite

Inactive Records Onsite

Inactive Records Offsite

2. Does your file storage include multiple locations? Where are they?

3. What is the total footprint (in sq ft) your organization has dedicated to file storage? Estimate the cost associated with that for:

Active Files

Historical Files

4. If you use off-site storage, estimate the total percentage of total collections retrieved:

Daily

Weekly

Monthly

Quarterly

5. What is the current number of employees involved in performing filing and retrieving tasks?

6. Estimate the time in hours per day those personnel spend retrieving, filing, refilling and searching for files.

9. How much are you currently spending annually on filing supplies like folders, labels?

7. Within your current file organization model, rank the effectiveness of your file retrieval:

- We are always able to find files (95-100% within reasonable time frame)
- We are usually able to find files (75-95%)
- We can find files most of the time (50-75%)
- Frequently we can't locate files (35-50%)
- File retrieval is a major issue for us (0-35%)

Collaboration & Access

1. Does your organization operate in offices in different geographical locations?

8. How are you currently tracking your files?

Honor System

Manual Sign In/Out

Software/Barcode System



2. List the customer facing elements (i.e. contact centre operators, loan officers, help desk personnel) of your business that frequently access customer files.

3. When more than one person or one location needs access to a given document at the same time, how are you currently handling the situation? (i.e. consider the number of copies, wait times)

4. Do you have employees who operate outside of the office, such as:

- Remote workers
- Sales staff
- Teleworkers
- Field personnel (i.e. service technicians, engineers)

5. Describe the mobile and/or wireless communications platform your remote and mobile workers currently use:



Compliance & DRP

1. How are your critical records currently identified and stored?

2. How quickly could you assemble and turn-over financial and other records in the case of an audit or e-discovery?

3. How would your organization be impacted by a catastrophic loss of the records collection, fire, flood etc.?

4. What would have to be done to recover business critical documents and information?

Records Management Strategy

1. Do you have an existing records management program?

2. Are you anticipating rolling out any records management or enterprise content management platforms in the next 36 months?

5. How quickly is your current records collection expanding?

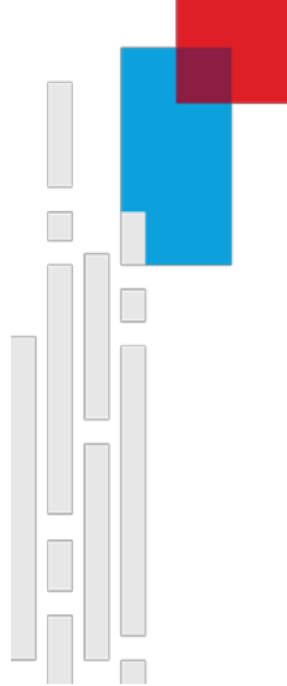
3. Are there any other major corporate initiatives underway that should be considered as part of a needs assessment exercise?

6. Are your current filing practices and software applications compatible with the imaging process?

4. Is there a merger or an acquisition in your organization's future?

7. What budgetary considerations (i.e., software, equipment) need to be factored in?

8. Are storage and retrieval issues limiting your organization's ability to respond to business demands?



In Our Experience...

We hope that the exercise of going through this needs assessment has been helpful in illustrating where imaging might strengthen your overall RM program. These questions are designed as a starting point, a way for you to gather information that will help you match solutions to your needs.

At TAB, our long-standing experience in helping companies with their imaging requirements has taught us that every situation is unique. In many cases, a complete conversion to electronic isn't desirable or feasible, but instead converting day-forward files, historical files, or critical files is what is needed. Whatever you are looking for, if you are want to find out how imaging can help your organization, please call us.