

Spotlight: **TECH INNOVATORS**

Getting a handle on your data

Having the right information management policy in place can give your employees the power to stop hoarding massive amounts of data and delete away.

An information management, or IM, policy lays out what kind of data should be kept and what kind should be deleted, and establishes a sound, objective method to apply to company data.

So, why should you have an information management policy?

- **To reduce IT costs.** The purpose of an IM policy is to reduce the amount of data kept in the system, which can cut the cost of electronic storage, or at least, a reduction in the rate at which those costs are rising.

- **To reduce risk.** If your company is sued, having an IM policy in place can help you withstand a claim that you deliberately destroyed data.

- **To reduce e-discovery costs.** E-discovery is the use of sophisticated software running on powerful servers to search electronic documents for evidence during the discovery phase of a lawsuit. If there is less data to search, the cost of e-discovery should be lower.

- **To increase productivity.** By forcing employees to categorize data, an IM policy leads to better organized data on the front end, reducing the lost productivity that results from searching for data in a disorganized system.

Knowing these benefits, you can move forward to design and implement



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a company-wide information management policy. These following steps provide a basic guide for getting started:

- **Take inventory.** To establish a baseline, find out how much disk space is being used to back up and archive data, how many backup tapes are stored off-site, how much data each tape contains and how many paper files are stored on- and off-site. Once you've accounted for how much data your company has, take a sample of the data to get a rough idea of how much

qualifies for transfer and how much can be deleted.

- **Identify the types of records that must be retained.** In general, records that should be retained fall within one of these four categories:

- Marketing plans and materials
- Customer service records
- Purchasing records
- Financial records

- **Institute a strict email retention policy.** Create a policy that automatically deletes any email not moved to a folder within a certain time frame (90 days is a good starting point)—no exceptions.

- **Kick off and sustain your program with records retention week and periodic audits.** Give each department a deadline for cleaning up their records, which culminates into a "Records Retention Week," during which everyone goes through all data under their control — both electronic and paper files — and decides what to keep, archive and trash.

- **Prevent unauthorized data removal or archiving.** An IM policy would be meaningless if data can be removed from the audit process, which is why companies wanting a strong IM policy should require that all data be saved on the company's servers, not on individual desktop computers.

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