

# INFORM

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## DEVELOPING A PAPERLESS / PAPERLITE DIGITIZATION INITIATIVE

@Princeton University  
June 14, 2018



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# Agenda

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Drivers for Removing Paper from Business

A Realistic Roadmap to Digitization

Challenges to Paper Reduction & Tech Adoption

Hybrid Environment – Blended Solutions

Case Studies & Success Stories



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# DIGITAL TRANSFORMATION



- Business Agility
- Efficiency
- People-oriented
- Customer-centric



# PAPER + PROCESS = PROBLEMS

# 83%

Success & productivity slowed  
by outdated ways of working  
with documents



# HARD COPY TO DIGITAL

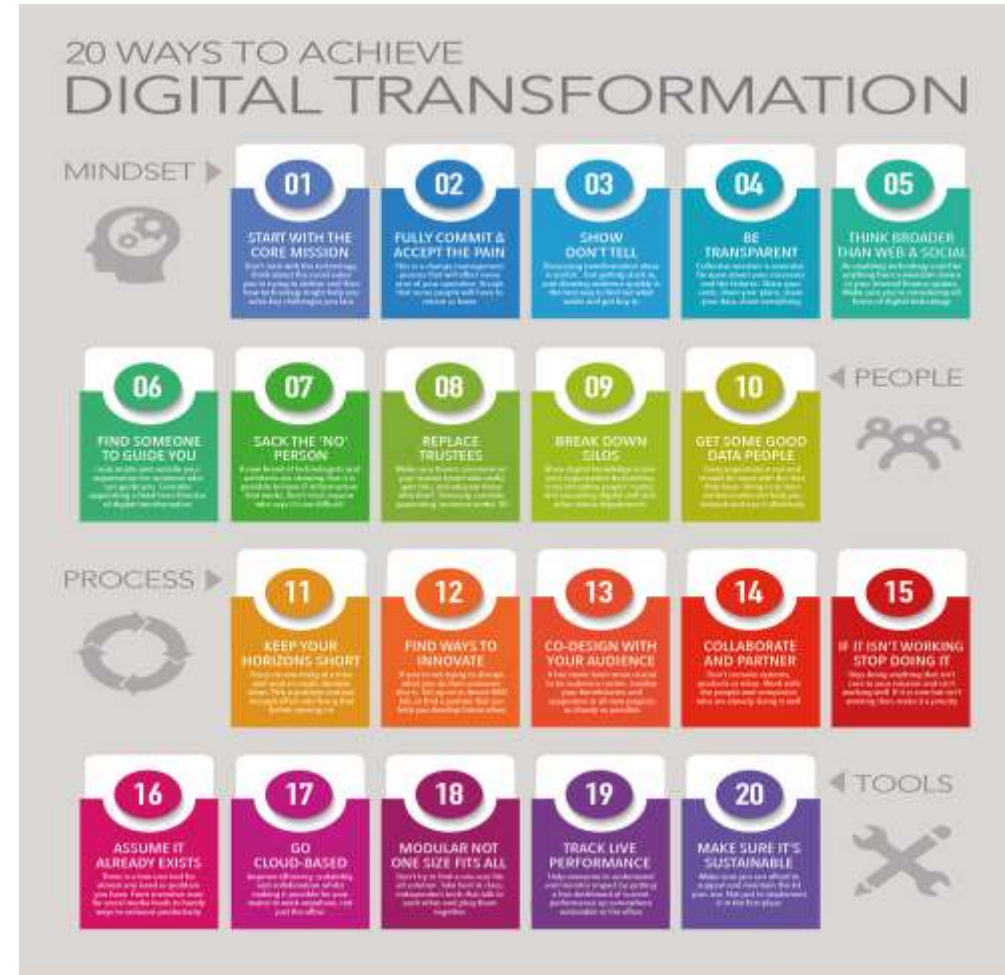


**What does good look like to your organization?**

# A REALISTIC ROADMAP TO DIGITIZATION

“Digital transformation is not an end state”

- A. Mindset
- B. People
- C. Process
- D. Tools





# THE CHALLENGES...



## Less than 100 Employees

1. Lack of Expertise to Lead Digitization Initiatives
2. Employee Pushback
3. No Overarching Strategy for Digitization
4. Business Partners Unable to Support
5. Limited Budget

## 100-1,000 Employees

1. Employee Pushback
2. Organizational Structure Gets in the Way
3. No Overarching Strategy for Digitization
4. Limited Budget
5. Lack of Expertise to Lead Digitization Initiatives

## 1,000-5,000 Employees

1. No Overarching Strategy for Digitization
2. Lack of Expertise to Lead Digitization Initiatives
3. Limited Access to the Required Technical Expertise
4. Employee Pushback
5. Limited Budget

## More than 5,000 Employees

1. Lack of Expertise to Lead Digitization Initiatives
2. Organizational Structure Gets in the Way
3. No Overarching Strategy for Digitization
4. Limited Access to the Required Technical Expertise
5. Employee Pushback

# THE HYBRID ENVIRONMENT



# DIGITAL STEPPING STONES

- Today reducing legacy records are a key priority
- Applying retention policies consistently
- Start somewhere in your organization (HR, AP, Etc...)
- Everyone has a scanner in their pocket!
- Interoperability
- Promote successes where digital applications are run
- Back file vs. Day Forward approach
- Don't let Paper in the front door
- C Level Support / Budget





“Times and conditions change so rapidly that we must keep our aim constantly focused on the future.”

- Walt Disney

# CASE STUDY



## Challenges

- Large, complex, highly active case files
- Lack of storage space

## Solution

- Back-file Document Imaging
- Document Web Hosting in the Online Record Center
- File Room Management

## Results

- Unalterable electronic documents
  - Disaster Recovery
  - Creation of additional revenue-producing space
- 
- *Greater business & compliance control*
  - *Mitigates the risk of ever losing the collection*
  - *Access is permission-based with complete audit trails*
  - *24/7 access to online inventory & online service requests*
  - *Ability to modify and append documents to current records*

# CASE STUDY



7,000 employees

30 locations

## Challenges

- Efficiency
- Compliance
- Security

## Solution

- Digitization
- E-Forms
- Automation

## Benefits

- Reduce costs
- HR more strategic
- Improve compliance & security
- Improve employee experience





## DEVELOPING A PAPERLESS / PAPERLITE DIGITIZATION INITIATIVE

Time:  
Vendor Room



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## CARL SCHRIEFER

VP, Account  
Management  
GRM

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**SPEAKER**

### Carl Schriefer Vice President, Account Management GRM Document Management

In his current role, Carl serves as the Vice President of Account Management for GRM Document Management. Since joining the company in 2008, he has assisted GRM's clients with complex records and information management issues including risk mitigation, cost analysis, retention compliance and enterprise corporate governance – bridging the gap between physical records storage and the implementation of more cost effective digital solutions. Carl also spearheads GRM's contract management department and is the lead negotiator for the NJ Corporate office.

Carl started his Records Management career with Iron Mountain in 2004 as an Implementation Manager for their Data Protection division. Carl has over 15 years of Records Management experience and is considered a subject matter expert in document migration, hosting and digital document conversion.

He currently serves as VP, Membership for the ARMA NJ chapter. Prior to his RIM career, Carl worked for Cablevision Systems as an Account Executive and Sprint / Nextel Communications as a Supervisor for their Corporate Accounts Group.

He holds a BA from the William Paterson University in Wayne, NJ and is actively pursuing his CRM. Carl currently resides in Rutherford, NJ with his wife and two children.



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## BJ JOHNSON

Senior Specialist  
Digital Solution  
Sales & Marketing

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**SPEAKER**

## BJ Johnson

### Senior Specialist, Digital Solutions Access Information Management

BJ is a Senior Solutions Specialist with Access Information Management where he works in Sales and Marketing. He is an ARMA NJ board member and has worked in the information management industry for over 17 years in areas including; record center operations, document conversion, account management, customer care, sales and marketing. As a member of the Sales team, he works with organizations to implement solutions that improve business processes, compliance and security. He also serves as a subject matter expert for the Access Marketing team where he assists in content development, trade show planning and social media strategies. Prior to Access Information Management BJ worked at Barnes and Noble.com and for a division of Marvel Entertainment.



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## Contacts for Speakers



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