



An offsite records facility provides clients with an added level of security, safety and service. Once you have decided to seek an offsite storage provider, you will need to work closely with your provider to determine the services that are aligned with the goals of your organization.

Choosing the right provider will require a comprehensive evaluation of their staff expertise, their facilities, use of technology, flexibility in service delivery and more.

Considering Offsite Storage?

We have
the information
you're looking for.

■ Before selecting an offsite storage provider

Today's increase in regulations, growth of information and changing technologies make it more important than ever to properly manage your organization's business information. An offsite records facility can help you lower your operating costs, improve employee productivity, create more value from information assets and protect your business from the risks of litigation, audit and disaster. Before making the decision to go offsite, it is important that the following questions be addressed:

1. Why is your company considering offsite storage?
2. What types of offsite services does your organization require?
3. What are your organization's requirements for service?

■ Questions to ask of a service provider

Once the decision has been made to store your company's information assets offsite, it is important to conduct a thorough analysis of vendors. After all, you are entrusting business-critical information to your offsite provider. As you evaluate your options, consider the following criteria to aid in your selection:

- Will the provider provide references?
- Does the provider have trained staff and industry experts?
- Does the provider understand the standards applicable to records management?
- Does the company provide the scope of services required by your company?
- Will the contract clearly define the services, costs and other pertinent details?
- Does the provider limit access to records stored at their facility to authorized persons only?
- Are there necessary personnel security clearances for classified, confidential or proprietary data?
- Does the facility have a monitored security system in place?
- Does the provider have a disaster recovery and business continuity plan that addresses your organizational priorities?

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- Does the facility have a fire suppression system and does it comply with proper fire prevention standards?
- Does the provider have adequate pest control?
- Does the provider have auxiliary power systems?
- Are proper environmental controls in place?
- Is the facility built to proper construction codes, ensuring a disaster-resistive environment?
- Does the provider require that records are stored at the same site or will they be dispersed among multiple sites?
- Does the provider use standard-size storage boxes?
- Does the provider require that certain storage containers be used? Must it be their storage containers?
- Are emergency retrieval services available?
- Can you easily access and retrieve records when needed?
- Will they provide 24 hour and 7 days per week service if needed?
- Will they retrieve an individual file folder when requested?
- Does the provider have a computerized tracking system to track boxes and do they know the status of boxes that have been checked in or out?
- Can the provider produce management reports?
- What are the safe transportation and handling capabilities?
- Does the provider use impact resistant transportation and storage containers?
- Are you able to witness destruction or disposal of records when the retention time has expired?

■ **Electronic data storage**

A thorough evaluation of an offsite provider's capabilities is even more critical for the proper care and storage of electronic media. For the offsite storage of electronic media, it is important that the offsite provider have a climate-controlled vault where proper temperature and humidity controls are maintained. Without these controls in place, many electronic and digital data storage media can be damaged or lost completely, unable to be recovered or reproduced.

■ **Working with an offsite storage provider**

When working with your offsite storage provider, expectations should be defined upfront to ensure possible discrepancies are resolved before entering into a contractual agreement. Part of this includes a clear understanding of service level agreements (SLA's). This includes delivery expectations of requested boxes, files, or media – rush or otherwise It is also important that you, as the client, be aware of particular processes or expectations the vendor may have in order that they provide the level of service that has been agreed upon.



It is our hope that Crown Records Management will be a useful resource in assisting you with establishing and/or assessing your records management program. Should you require the services of an offsite records storage company, Crown is available to assist you with all aspects of your records management requirements. We encourage you to contact us with any questions.

www.crownrms.com