

# 2021 GUIDE TO GOING DIGITAL

There's still time to digitally transform the way your organization manages records

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*The power of memory*  
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**CROWN**   
RECORDS MANAGEMENT

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**CHAPTER  
1**

# SEIZING THE MOMENT TO GO DIGITAL



**BY MONA LAI**  
**GROUP HEAD OF BUSINESS DEVELOPMENT**  
**CROWN RECORDS MANAGEMENT**

**The big questions our clients are asking right now are: When is the right time to go digital and how do we start?**

It might come as a surprise that such questions are being posed in 2021, but the reality is that the level of digitalization of businesses across the world has been over exaggerated.

There are many businesses which have high-level content management systems in place, and also lead the way in embracing automation, robotics, AI and IoT. Equally, there are many whose only experience of going digital is minimal, others who still rely heavily on physical data, and many more who have partly embraced electronic data but have no idea how to manage or protect it.

As a company originally built on box storage, Crown Records Management is well placed to know that paper is not dead and probably never will be.

But as we grow to offer new solutions, clients are increasingly realizing that advances in technology, increased data protection regulation and the need to keep up with competitors, mean they must start considering it now.



## **When is the right time to go digital?**

The truth is that any time is a good time and the global pandemic has underlined why businesses should think about it right now.

Organizations which had already implemented digital processes are finding it easier to survive the economic impact of Covid-19, being able to cope far easier with the move to staff working from home.

The pandemic is a lesson to all businesses that you cannot survive without going digital. It is an insurance against future disruptions and an investment in increased productivity and profits.

Going digital can also provide protection against the impact of increased data protection regulation – and from a rising realization by people that their personal data is valuable and should only be shared with trusted companies.

## What are the main reasons to go digital?



### SPEED AND EASE OF ACCESS

Digitization is the only way you are assured of being able to search for and locate the most recent and accurate information instantly. It is also necessary for staff to be able to work from home or a remote location while traveling. When processes are automated it can lead to greater efficiency, productivity and even save money.



### RETENTION

Given the very real possibility of punitive fines, the cardinal rule is to retain information only if legally required. Maintaining records past their legal life creates risk for your business. An automated retention schedule that manages the destruction of both digital and physical records is imperative here.



### DISASTER RECOVERY (DR)

Natural disasters are a fact of life: floods, fire, earthquakes, tsunamis, storms all occur every year. Having vital records in a form that can be easily and quickly recovered is essential. Having your records digitized and then secured by DR systems in other locations is the only way to ensure business continuity.



### ACCURACY

Every business transaction relies on having accurate records. This requires a digitization process to ensure that you record electronic records and accurately track the latest versions. Digitization provides the most current and most accurate information and facilitates the lowest business risk.



### COMPLIANCE

Every industry has legislation it must comply with. This includes industry-relevant legislation, the legislation of the country where it is headquartered, the legislation of the countries where it conducts its business, and even where one's customers and employees are from.

Most of this compliance legislation is around documents and processes. It is virtually impossible to meet all this constantly shifting compliance legislation without digitization. There are also huge financial penalties for not meeting compliance legislation.

## What's the current situation in the business world?

Businesses are already awake to the need to go digital and most companies have done so in some capacity.

However, we're still finding a lot of businesses which know deep down they need to move away from paper and look for digital solutions, but don't want to allocate budget. Now they are reaching the point where it simply cannot be ignored any longer.

There are companies which have a lot of boxes in storage but have no system of their own in place to know what is in them, what they're storing and no way to track these records.

In the past they have been worried about the size of the project. Who will run it? Who will be responsible? This is one of the reasons Crown Records Management has begun, in conjunction with our partners, to offer digital solutions. Typically, the companies needing help also have electronic data strewn about the business. They know there is a problem, but they fear it is too big to handle.

## How do you convince people to go digital?

It's a combination of explaining the benefits, explaining the threats or risks of not doing so and countering some of the myths that surround digital transformation. The benefits are easy to see: Going digital can save a company money, save their employees time, increase productivity and reduce risk of information being lost, stolen or misused.

Prospective clients also need to know the regulatory background because data protection is becoming a bigger and bigger topic. In Europe, the General Data Protection Regulation (GDPR) has led the way, but it's being replicated in many other areas of the world.

## Tackling myths

There are also some myths to tackle. One of the biggest blocks to going digital in some regions is that people fear automation because they worry it could lead to a loss of jobs. So there's opposition from employees who fear they could lose staff by implementing new systems.

We need to tell them about the benefits of going digital and how staff, through good training, can be given more fulfilling roles as a result of automation. Nothing should hold companies back from taking this important step to enhance and protect their business.

CHAPTER

2

# THE DIGITAL JOURNEY AROUND THE WORLD AND HOW IT WORKS IN REAL LIFE

BY ABISHEK MALAVIA, MANISH MISHRA AND GOURAV SANWAL  
CROWN RECORDS MANAGEMENT

## A customer story from Carlsberg India

Going digital is a topic which is being discussed in all areas of the world. We've asked international clients, partners and our own experts to understand what going digital really means.

Carlsberg India has various manufacturing plants and sales offices spread across the country. Suppliers and vendors were submitting invoices at all local plants and sales offices. The problem the finance team faced was the accessibility of records during the lockdown as offices were closed. Secondly, they were unable to process vendor payments in time and budgetary approvals were also being delayed.

## The main issues included:

- Finance and Accounts didn't have real time visibility on invoice processing status.
- Any query/clarification related to an invoice was done over email or by phone, slowing down the entire process.
- A third party used for the company's new invoice booking process was based remotely, therefore requiring a tool where invoices could flow to them digitally from various locations.

## THE RELATIONSHIP WITH CROWN RECORDS MANAGEMENT

Crown has been associated with Carlsberg India for almost five years, managing their physical records storage at Gurgaon. Their finance and sales & marketing department were already using our storage services.

## THE ADVICE

We advised Carlsberg to adopt digitization and transform their processes using Document Management System (DMS) Application and Workflow tools. We suggested our Account Payable (AP) Module in our Document Management System software.

## THE OUTCOME

The feedback has been exceptionally good from the Carlsberg team including their CFO and Senior Managers from the finance domain. They report that the solution is effective.

## THE SOLUTION

Legacy documents were scanned and indexed, along with incoming and ongoing records. Then we installed AP Module as a SaaS model. This allowed:

- Finance and Accounts to have a real-time status report on invoice processing.
- The third-party invoice processor to directly receive invoices from all manufacturing plants and sales offices for review/approval/processing.
- All queries/clarification related to invoices to be made on the Crown application with a complete audit trail.
- Access to a daily report on invoice processing status and sharing with a centralized Single Point of Contact (SPOC) from Carlsberg via auto mailers.

## FUTURE OPPORTUNITIES

In the next phase we are looking at integrating with Carlsberg's Enterprise Resource Planning (ERP) tools to allow a seamless flow of information. Work has already begun on a project with the company's Sales & Marketing team to digitize dealer agreements across India.

Box Storage is a statutory requirement in India but going digital is a necessity in an environment where access to the information should be seamless and immediate. Improved efficiency is the outcome that encourages the conversion of box storage toward digital solutions.

## THREE VIEWS ON DIGITIZATION FROM AROUND THE WORLD



**India**

**Manish Mishra**

Senior Manager Treasury & Accounts Payable  
Carlsberg India

### **Manish, what was the focus of your ‘going digital’ project?**

“It was about centralization of invoice processing. We have seven plants in India as well as regional offices and a head office, so there were around 14 or 15 locations in all we were using for account invoice processing. It was expensive and complicated to control.”

“The initial focus was to centralize all these systems into one location where we could process the invoices. Secondly, it was about the retrieval of documents. Whenever there was an audit or a requirement to retrieve documents, we were always facing difficulties. There were two big problems: firstly, we were wasting time because we weren’t getting them immediately, and secondly out of every 10 documents maybe three we couldn’t find. So, the key area for management was to centralize the process and create a system where document retrieval should be immediate.”

### **What are the big benefits of the new system?**

“The key benefit is that all documents are available with one click. We can log in and get any document we want. We can also search documents in several ways and it’s very easy to find them. There is also a workflow in place around invoice processing and it is so much easier to manage.”

### **Is this your first step on the digital ladder?**

“No, the first step was to centralize all our payments at head office and introduce some auto payments which reduced our time. Now we have tackled invoice processing with Crown and the third part will be about collection optimization, which is underway.”

### **How did you come to choose Crown Records Management?**

“When we started looking for a new solution, Crown was already working at one of our locations on physical documents. We discussed how to solve this problem and they proposed a data management system solution.”

“We spoke to other businesses, too, but because we already knew Crown and had experience with them, and their solution was great value.”

“So, we bought a demo - and the product met all our requirements around document retrieval, data formatting and keeping documents online.”

### **Why did you decide to start that digital journey?**

“We came into India in 2007 and the growth since then has been fast. The initial focus was to drive sales but now we have achieved a level in India the company focus has shifted to trying to optimize all areas of the way we work and look towards automation.”

### **Was it difficult to get employees on board with the journey?**

“Initially we had some challenges from staff because they felt their job might be at risk. But now employees are feeling great about the new systems which are supporting them to do their work more efficiently, because all the things which were done manually are now done by the system. So, the employees can focus on bringing in new business or making more efficiencies.”

### **Do you think that going digital will mean the end of paper and of box storage?**

“Not in India. The business for physical storage continues because local laws in India dictate you must keep documents for a period. So, we need to support both physical and digital data storage.”

### **How do you see the future for business in India?**

“After the challenges they faced in the lockdown, every Indian domestic company, even small ones, are looking at it. There’s a push in India to go digital.”

### **Finally, how do you look back on the project you’ve completed and how was it working with Crown Records Management?**

“We’re very happy. It’s a great thing to work with Crown because the service level is tremendous. We’ll be looking for Crown’s help with OCR technology next, to help us read all the invoices automatically. So, it’s an ongoing relationship.”





## U.K. and Europe

### David Fathers

Regional General Manager U.K & Ireland  
Crown Records Management

#### **Do you think there are still companies out there which need to go digital?**

“Absolutely. According to the Association for Intelligent Information Management (AIIM) in the U.K., fewer than one in five organizations have fully automated their core back-end processes, despite two decades of business process management. That means everything that businesses do is still not as efficient as it should be.”

“We saw a real change in mindset during the pandemic as people began to work from home. It means employees are now producing more electronic documents and storing them, but not in an organized way. So, finding information can be difficult and businesses waste a long time searching for information and not knowing where it is. They've got it electronically, but they don't know where.”

“There's going to be a desire from businesses to put that right now – and there's a big opportunity for us to serve that need. Companies started to look at workflows and automating their processes a long time ago but now the need is more urgent, and it's being taken to a new level.”

#### **Does it mean the end of paper records?**

“It's very unlikely that we'll ever get rid of paper entirely. There will always be something that needs to be retained, such as historic data archives.”

“But these days we talk about removing paper at source, before it even gets created. You shouldn't be sending anything to print and you shouldn't be receiving physical documents. You should be receiving electronic documents and it's about how you manage emails and attachments.”

#### **Do you feel it's a big moment of change for Crown Records Management, too?**

“I do. We're not going to turn our back on our legacy document management but there is a lot of work around digital transformation of workflow and Information Management out there.”

“To help clients, we've put together the Crown Digital Office suite of products and services, which is everything from digitization, through physical document management into all of these workflow solutions tailored to different industry sectors.”

#### **Where are new clients coming from?**

“Existing clients who store boxes and are now looking to go digital are very interested - and that's a big pool for us, people we already have relationships with.” “But there are also a lot of new opportunities with new clients across many business sectors, and that's exciting.”

**How do you approach the sales aspect? Is it a matter of scaring businesses into going digital to avoid data protection fines?**

"For me and the Crown team, I think it should be all about the positive aspects. What will the benefits be for the client?"

"Of course, you need to make sure you are GDPR compliant. But these are solutions which will help streamline costs, saving time and effort. Going digital can make life simpler for your business and your people as well as reducing costs. That's essentially our purpose at Crown, to make complex things simply for our clients."

**What are you currently doing in the U.K. to offer a wider range of digital services?**

"We've recently partnered with ELO Digital, a German company who offer specialist software on managing and supporting digitally transforming the management of both physical records and data, and we'll be working closely with them to refine these solutions among our clients. In Asia, we're also working with another company for the same purpose, Knowledgeone. So that's all very exciting."





**Asia**

**Frank McKenna**

CEO, Knowledgeone Corporation  
(Global partner of Crown)

### **Can you list some of the business problems that Knowledgeone's solutions could solve for Crown's clients?**

"The most common problem we were first asked to solve (way back in 1984) was missing or lost file folders. Digitizing paper records and processes with an electronic records management system and then tracking the movement of all records using bar codes and bar code readers."

"This functionality is still part of our current RecFind 6 product and is still used extensively by our customers with physical records. But in today's world most of the problems we are asked to solve are in relation to business processes, commonly called workflow. As expected, most processes are document centric. Examples are mortgage application processing, contract management, case management and securities management. RecFind 6 is also used as a solution for vaccination management, capturing and managing all the child vaccination information in the state of NSW, Australia."

"And of course, digitization of physical records, the management of electronic records along with the automation of business processes are the most common requirements across our customer base."

### **Could AI, IoT or robotics bring changes in this field?**

"The future, and certainly our future development, is around the appropriate use of Artificial Intelligence (AI) and Natural Language Processing to automate manual processes such as record classification. Our plan is to move our fully automated RecFind 6 products like GEM (which offers automatic email selection, analysis, capture and classification) and RecCapture (automatic electronic document selection, analysis, capture and classification) to run on an AI based engine. So, that's a technology already in the pipeline."

### **What about cloud solutions instead of on-premises solutions?**

"We have offered cloud-based solutions for many years and are now seeing an accelerated take-up of this option. More and more of our clients are asking us to move their on-premises solutions to the cloud. Our online new service, RF6Cloud.com, provides just cloud-based solutions for our smaller SME customers."

### **Can you pick out your most popular products and what they do?**

"The most popular products are our core product RecFind 6 (one that every customer has), and the RecFind 6 Button. RecFind 6 is a fully featured Electronic Document and Records Management System (EDRMS) with all the functionality any organization will ever need including workflow, document imaging, full text searching, barcode reader support, offsite storage management, check-in, check-out, version control, retention, classification and a full power report writer together with a full complement of standard reports." RecFind 6 also offers a web client in addition to the standard smart client to assist in rolling out a zero footprint, zero maintenance application."

# WHY SCANNING ISN'T ALWAYS THE ANSWER

By **Mona Lai**

Group Head of Business Development, Crown Records Management

An issue we have noticed in some regions, including in APAC, is some confusion about what going digital means. Many businesses come to us convinced that scanning all the documents in their boxes is the perfect solution to resolving their information management problems. In fact, there's sometimes a misconception that going digital is all about scanning. We hear it from customers all the time, they want to scan all the documents and put the electronic images into a system.

That's a huge project which needs a big budget because scanning is expensive. The cost of scanning a box of paper is the same as storing a box for seven to 10 years. It's important only to put the information you really need into your digital systems. Scanning is still an important part of our client offer, but we will often tell businesses that it's better to keep your box, know what's inside it and have a system which manages the retention schedule and tells you when to destroy it, rather than scan absolutely everything.

The only time we advise customers to scan is when it is information they need to retrieve or share frequently, or to have a back-up copy of heritage documents which need to be kept long term. Critical documents needed for business continuity should also be scanned. What is more important is to focus on producing less physical data in the first place, while having content management systems in place to manage the physical documents you do have.



CHAPTER  
**3**

# GOING DIGITAL: HOW TO DO IT



**BY FRANK MCKENNA  
CEO, KNOWLEDGEONE CORPORATION  
(GLOBAL PARTNER OF CROWN)**

All organizations beginning to move to digitization are faced with the same problem. How do they capture and clean up all their existing paper and electronic records and where do they start?

**Common questions are:**

- How do we determine redundant content for deletion?
- How do we analyse millions of documents and items and apply pre-defined classification and retention to them?

The good news is this clean-up process is part of every Electronic Documents and Records Management System (EDRMS) implementation, and specially designed tools are available to make it easier and faster.

Knowledgeone are our Asia-based strategic partners for delivering specialist software solutions to tackle digital transformation. Within Europe ELO Digital are our partners for that region.



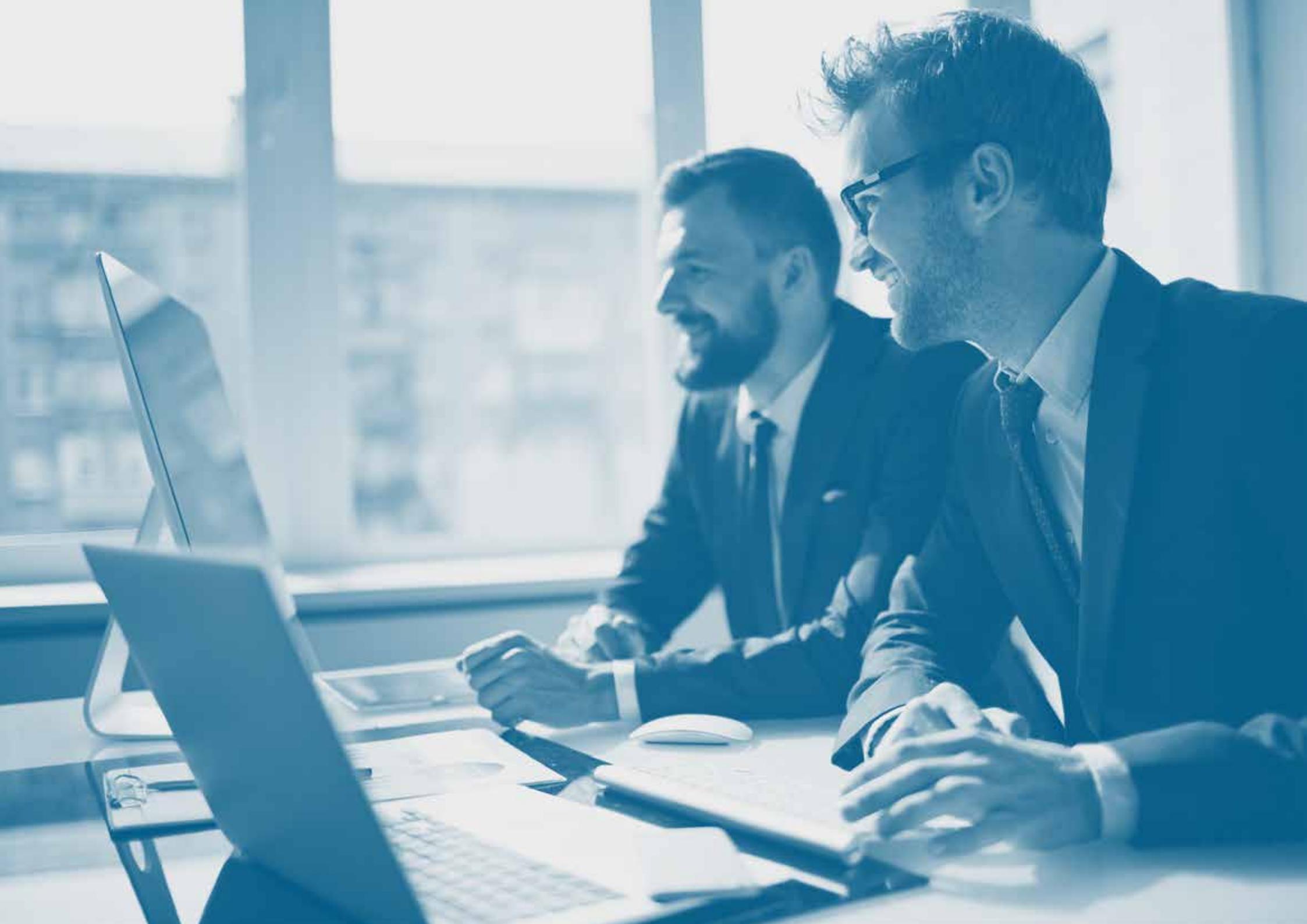


## A five-step plan to going digital

1. Assess the records or data that exist in the business and it's form (for instance, paper, Excel spreadsheets, legacy system records).
2. Identify what you want to capture. Is access to this record required every day, every week, every month, once a year, infrequently or never?
3. For physical data, consider whether you need to back-scan or just start digitizing paper records from day one. In most cases, the cost to back-scan many thousands of paper file folders may exceed the benefits.
4. Now decide how you want to capture it all. A variety of automated tools are available to make the capture and import process as quick as possible.
5. Choose how you want everything to appear in your new records or document management system. This is about how everything is 'mapped' into a new data structure.

The journey is different for each business. For companies who feel it all "looks too big a problem" it might prove sensible to take things one step at a time. For instance, by just digitizing one section or division first as proof of concept, developing the team and methodologies that will work best for that organization and its culture from there. Some businesses choose only a few troublesome business processes to automate first.

Of course, it's a big decision to start the digital process in the first place and businesses normally ask how long it will take, how much it will cost, whether we can integrate into their legacy systems, how disruptive the process will be to normal business and how much training will be required. The answers are different for each individual business, but modern tools make it quicker, better value for money and more intuitive than ever before.



## HOW GOING DIGITAL COULD SAVE A BUSINESS MONEY

A great driver for digitization is to increase productivity. To enable employees to do more in the working day, to give employees more time to work on important matters and to reduce the time they must spend on mundane tasks.

Simply being able to find anything instantly can save thousands of hours and do away with workplace frustration. Knowing that you have access to the most current and accurate information facilitates better and faster business decision making.

Digitization is a win-win in all business operations and always leads to increased productivity and profits. As they say, knowledge is power, and digitization provides the knowledge businesses need to be successful.

## HOW DIGITIZATION SAVES TIME

Saving time is a big issue for most businesses because it leads to greater efficiency.

In the early days, just being able to quickly locate missing file folders saved organizations thousands of labor days. A missing file folder could be in hours instead of days or weeks or, in the worst case, never located.

An automated records management system saves even more over a manually operated physical records management system – and a fully digitized electronic document and records management system (EDRMS) moves up to another level. Adding automated business process management (workflow) provides the ultimate increase in productivity and streamlined business processes.

# CONCLUSION

As businesses across the world begin to recover from economic disruption caused by the pandemic, and start to look ahead once more, there is a huge opportunity to seize the moment and go digital. For many companies it is something they have been considering for many years, watching competitors and businesses in other industries go first and wondering if they need to make the same commitment.

Now, with increasingly intuitive software and easy to install content management systems delivered by Crown Records Management and its partners Knowledgeone Corporation and ELO, it is time to take the plunge.

As a company which was built on box storage, Crown Records Management has a global customer base which stores millions of documents in boxes right across the world. It will always be a big part of our business and it's hard to see a future in which paper disappears altogether.

However, there is now a chance to help those clients in a new away, and grow our own business in the process, by helping them go digital. There are also millions of businesses, from SMEs to global corporations, looking for help at a time when it is becoming increasingly clear they must digitize their records and automate their processes to keep up with the modern world.

There has never been a better time to go digital, and never a better time to be offering our clients digital solutions.



Get in touch

**Crown Records Management** helps clients to maximize the value of their “corporate memory” through the storage, active management and timely distribution of information assets.

In 40 countries, Crown provides secure archiving and retrieval of information in physical and electronic format, as well as digital imaging, media management and data destruction.

If you have any questions regarding this whitepaper, email us at  
[info@crownrms.com](mailto:info@crownrms.com).

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