

# Case In Point

CASE STUDY

## E-mail Management



### Governmental Trust Turns To Iron Mountain for Accurate, Efficient, and Compliant Electronic Records Management Program

**CLIENT:** Non-profit governmental trust

**CHALLENGE:** To improve the way electronic records are managed

A non-profit governmental trust, providing pension, disability, and death benefits for employees of participating cities with nearly \$11 billion in assets under management, engaged Iron Mountain's Consulting Services to design and implement a compliant and efficient electronic records management program.

In 2002, the governmental trust launched an initiative with Iron Mountain's Consulting Services to update its records management program and to plan a strategy for improving the management of its electronic records. There were a number of reasons why the organization was particularly interested in establishing records management controls for e-mail messages:

- There was a need to bring all electronic records into compliance with the Records Retention Schedule.
- An e-mail usage policy existed, but no technology was in place for enablement or enforcement.
- Lengthy retention requirements for many of the governmental trust's records made the e-mail system inappropriate for long-term document retention and management.

The governmental trust engaged Iron Mountain's Consulting Services to help the organization realize significant liability reduction, expand records control, and to improve operational efficiency through a larger investment in the electronic records management program. The governmental trust previously engaged Iron Mountain's Consulting Services for the development of an updated Records Management Program and an eRecords Gap Analysis. The eRecords Gap Analysis Report provided an objective measure of the governmental trust's current

records management program and a documented road map to electronic records management best practices. It was the logical next step for the governmental trust to implement the recommendations that were presented in the report.

Managing electronic messages for legal and regulatory compliance involves more than just applying technology to the problems. The governmental trust's success is the result of adopting a comprehensive approach that includes a blending of strategy, policy, enabling technology, training and communication, and compliance monitoring. The governmental trust's electronic records management program will be implemented in multiple project phases over several years in order to select and implement the appropriate approaches that blend with the governmental trust's long-term business and technical strategies. The goals of Phase One of the program are to:

- Leverage resident capabilities of Microsoft® Exchange and VisiFlow® to manage e-mail.
  - Expand the scope of the existing e-mail policy.
  - Develop comprehensive procedures for retention and deletion of e-mail messages.
  - Provide communication and training to all users.
- Subsequent phases of the program will involve selection and implementation of a Records Management Application (RMA) that will manage all electronic records.

#### Contact Us

Iron Mountain's Consulting Services  
[www.ironmountain.com/consulting](http://www.ironmountain.com/consulting)

800-899-IRON

745 Atlantic Avenue  
Boston, MA 02111