BANKERS BOX®

ORGANIZATION MADE EASY™

RECORDS STORAGE SELLING GUIDE

TAKING BACK YOUR BUSINESS

WHAT TO LOOK FOR "OUTSIDE" …

IRON MOUNTAIN
INCORPORATED

recall™
Your Information. Securely Managed.

BE AWARE OF REGIONAL COMPETITORS

WHAT TO LOOK FOR "INSIDE"…

WHO TO CONTACT…

RECORDS MANAGERS	FACILITIES MANAGERS
IT MANAGERS	OFFICE SUPPLY MANAGERS

TAKING BACK YOUR BUSINESS

CUSTOMER NEEDS ASSESSMENT

OPENING QUESTIONS…

- Does your company have a records retention schedule in place?

- What kind of records storage system is being used?
  - Once determined, proceed below for additional questions

If ON-SITE STORAGE is being utilized…

- Ask how long they would like to keep records on site? 95% of document usage occurs within the first 3 years

- How often are record accessed?

- Is it difficult to locate records?

- Where are they currently storing documents?

- Do they have any concerns with their current on-site document storage?
  - Is space for storage a critical factor? Proceed to **Understanding the Category Drawer Selection Guide**
  - Do they currently have space and a shelving system? Proceed to **Understanding the Category Box Selection Guide**

If OUTSOURCED/OFF-SITE STORAGE is being utilized…

- 95% of document usage occurs within the first 3 years

- Recommend moving these active/semi-active files back on-site to avoid incremental fees due to document retrieval, refile, pick-up, delivery, and handling, disposal and hostage fees

- What are the concerns with on-site storage?
  - Is space for storage a critical factor? Proceed to **Understanding the Category Drawer Selection Guide**
  - Do they currently have space and a shelving system? Proceed to **Understanding the Category Box Selection Guide**

- If converting to on-site storage is out of the question, recommend Bankers Box® boxes to help save money & ensure secure boxes for transportation. Proceed to **Off-Site Box Conversion Guide**

If DIGITAL STORAGE is being utilized…   **OR**

- Do they scan & shred documents?

- Do they scan & store documents?
  - Are they storing On-Site or Outsourced/Off-Site? See questions above
- 95% of document usage occurs within the first 3 years. Recommend keeping active/semi-active files in hard copy and on-site to avoid digital "treasure hunts" during busy times