

IRON MOUNTAIN
CONSULTING SERVICES





IRON MOUNTAIN CONSULTING SERVICES

Compliance Expertise for Information Management.

We have an extensive, proprietary database of legal guidelines, regulations and court decisions. The combination of unparalleled knowledge and implementation experience ensures that your organization:

- Complies with recordkeeping requirements to minimize regulatory risks across physical and electronic records.
- Minimizes litigation risk in light of new legislative requirements regarding electronic information.
- Protects confidential data to reduce risk to your reputation.

Corporations today face unprecedented information management challenges. Retention and privacy regulations are multiplying faster than companies can keep up. The casual use of email has dramatically increased the potential evidence that can be used against a corporation. The cost in time and money of responding to increasingly common discovery requests is staggering. And the exponential growth of both paper and electronic records is putting a heavy strain on operational budgets.

Compliant Records Management is the answer

A Compliant Records Management program will minimize your regulatory and legal risks, reduce discovery and records storage costs, and remove operational and technology complexity.

Iron Mountain Consulting can work with you to design, implement, and maintain a Compliant Records Management program that is comprehensive and legally credible. Records management programs developed with Iron Mountain Consulting can help your organization:

- Efficiently comply with recordkeeping and data privacy requirements to minimize regulatory risks
- Effectively control email to reduce litigation exposure
- Protect confidential data to reduce reputation risks
- Proactively administer discovery requests to control your litigation costs
- Properly manage escalating paper and electronic record volumes to reduce storage costs and complexity

We have solutions for companies of every size—from the *Fortune 500* to small businesses.

Compliant Records Management



1. & 2. Program Strategy

Iron Mountain Consulting can work with you to develop a holistic Compliant Records Management blueprint. We can provide you with a comprehensive strategy or one that just addresses specific areas such as e-records or litigation readiness.

Records Program Assessment and Strategy

Iron Mountain Consulting can design a comprehensive strategy that will provide high-level guidance on how to design, implement, and maintain a Compliant Records Management program. Our consultants assess your records management practices vs. industry best practices then identify your highest risks—to plan and prioritize accordingly.

e-Records Strategy Development

Our e-Records Strategy Development provides you with a practical way of tackling the proliferation of e-records. It will give you fast, meaningful results.

Our e-Records Strategy will:

- Identify your categories of e-records that pose the greatest risk
- Show you how to leverage your existing technology infrastructure to meet your records management needs
- Develop an e-Records Roadmap that provides the why, where, and how to apply records management principles to electronic information

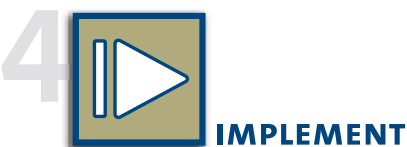
Our consultants are uniquely qualified to address e-records management because they have both technology expertise and records management knowledge.

Litigation Readiness Assessment

Iron Mountain, in connection with a team of experienced attorneys, offers a unique, comprehensive program for analyzing your company's litigation readiness position, identifying its strengths and weaknesses, and providing recommendations for defensible records management and litigation response practices. This assessment includes:

- A “gap analysis” addressing weaknesses in existing records management and litigation response procedures and processes, looking at potential sources of discoverable information within your organization
- Analysis of current workflows for document preservation, review and production tasks, and recommendations for streamlining effort and reducing time and expenses
- An action plan for improving your company's litigation readiness position

SIX STAGES OF COMPLIANT RECORDS MANAGEMENT





3. Program Development

Our consultants' extensive real-world experience enables us to help you develop a professional and comprehensive records management program.

Here are the major elements of Compliant Records Management Program Development. We can provide you with all of these services, or just the particular services that meet your needs.

Policy and Procedure Development

Iron Mountain Consulting designs the policies, processes, and procedures that can help your company manage records more effectively and protect your company during litigation.

Organizational Guidance

Iron Mountain Consulting can work with you to develop a records management organization to fully support your Compliant Records Management efforts. We will provide guidance on how to fit the records organization within your overall corporate structure and how to create the right structures to support program governance, initial implementation, and on-going management.

Retention Schedule Development and Legal Research

Iron Mountain consultants have access to an extensive, proprietary database of legal guidelines, regulations, court decisions, and industry-specific knowledge. We work closely with you to design and implement a records retention schedule that is inclusive of the records created and maintained by your company and based on the latest legal research and industry best practices.

Training, Communication, and Publicity

Effective training and communication are critical components of any change management effort. Your Compliant Records Management program requires training, appropriate communication, and internal publicity to be successful. Leveraging the lessons learned in our many successful engagements, we can help you design a training and communication plan that will achieve your program goals. We provide communications content tailored to the specific audiences and objectives of your company and an intranet site for the publication of your company's records management program.

GUIDING PRINCIPLES FOR PROGRAM DEVELOPMENT

- Solicit senior executive sponsorship.
- Take a holistic view of the current program.
- Design for easy adoption.
- Build a master plan and then implement specific solutions.
- Implement consistently across all media types, business units, and geographies.



4. Program Implementation

Implementation is our specialty. Iron Mountain Consulting has more records management implementation experience—with both paper and electronic records—than any other consulting firm. We develop with the end results in mind—making your program operational at all levels. Our consultants can help you with every aspect of implementation: training and program roll-out, applying retention policies to physical and electronic records, and expanding your program internationally.

Here are the major elements of Compliant Records Management Program Implementation. We can provide you with all of these services, or just the particular services that meet your needs.

Training Delivery

Iron Mountain Consulting has extensive experience designing records management training content customized for specific corporate audiences (e.g. executives, employees, records coordinators). We deliver the content in the format that is most effective and familiar for your organization: live presentations, webinars, or self-paced e-learning modules.

Applying Retention Policies to Your Paper Records Inventory

We can significantly reduce your records liability and storage costs by applying your retention schedule to your existing inventory of paper records. Our consultants use Iron Mountain's proprietary software technology and rules

repository to apply the correct retention classifications to your legacy paper records—so you know when each record is eligible for disposal.


Our rigorous process enables you to prudently dispose of obsolete records with confidence, in conformance with your records retention policies. Eliminating obsolete records reduces storage and discovery costs.

Implementing Retention Policies for Your e-Records Systems

Iron Mountain consultants can show you how to implement retention rules to your electronic records. We'll help you identify the types of records stored within your software applications and apply retention requirements to those applications. We also work with you to implement records management principles and retention rules to your email and desktop applications.

Expanding Your Records Management Program Internationally

Iron Mountain Consulting can help you extend your US-based retention schedule, policies, and procedures to business operations in other countries. We work in connection with a team of experienced attorneys to conduct research, to identify country-specific laws and regulations pertaining to records retention and propose retention requirements. With our research, you can rest assured that you are taking into account the relevant laws for all countries where you conduct business.



➔ GET EXPERT
GUIDANCE
TODAY

To learn more about how our consulting services can help you design and implement a professional records management program, call us at (800) 567-8903 or visit us at ironmountain.com/crm



5. & 6. Management and Audit

If you're an existing Iron Mountain customer, you'll find that our Consulting deliverables leverage the full suite of Iron Mountain records management products and services that are designed to help you manage your records efficiently and effectively. IMConnect™ provides you with a web-accessible vehicle for managing your physical inventory. Iron Mountain's Digital Archive enables you to search and view digital assets within a secure hosting environment. Our Retention Center product offers retention management and litigation hold management capabilities across distributed asset repositories. Iron Mountain's Secure Shredding services manage the disposal of records in compliance with a customer's records management and data privacy requirements.

In addition to the variety of products and services provided by Iron Mountain, our Consulting organization offers services designed to help you manage your records program on an ongoing basis.

Legal Refresh and Program Maintenance

Our Maintenance services ensure that your records management program remains in compliance and stays aligned with new laws, regulations, and business requirements. Our consultants work with you so that updates to your program are properly communicated and implemented in a timely manner.

Program Audit Services

Iron Mountain Consulting can design a comprehensive audit program for your company's records management program to determine if employees are properly following corporate policies and procedures. We develop detailed metrics to guide you through the audit process. We provide remediation recommendations to help you resolve areas of non-compliance.

WHY MORE COMPANIES CHOOSE IRON MOUNTAIN CONSULTING SERVICES

Partnership orientation. We view our consulting engagements as the opportunity to establish a long-term partnership—a partnership that will improve your information retention and protection practices year-over-year.

Accumulated expertise. Iron Mountain Consulting has been providing records management consulting services since 1996. Our consultants are experts in all aspects of records management—records retention, document management, electronic discovery, and data privacy. They draw upon an unmatched pool of resources and expertise from across Iron Mountain.

Proven methodology and tools. Our methodology and systems have been proven in the real world. We have invested in the right resources and systems to support our client engagements. These tools underlie every phase of our process, which means you see results faster—with less effort on your end. By working with us you can leverage our advanced starting point.

Unique implementation focus. In addition to helping you organize, assess, and develop, our team of experts can also help you implement your records management program. Iron Mountain is with you every step of the way and we provide the hands-on expertise to help you manage every aspect of program implementation.

Unparalleled industry expertise. Our experience in “operationalizing” Compliant Records Management for particular industries is unparalleled. Iron Mountain Consulting teams have helped *Fortune 500* companies in banking, financial services, insurance, energy, manufacturing, retail, life sciences, and many other industries.





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