

CASE STUDY: FINANCIAL SERVICES, U.K.

Background

The client has six offices in the northwest of England and had outsourced its document storage services to a company based nearby. The service relied on a daily delivery and collection from each office.

Problems

The client's supplier had not been recording indexing information on the exterior of boxes correctly and service levels had deteriorated. Boxes were going missing, deliveries arriving late and items requested absent. The situation became increasingly frustrating, and the company invited potential new providers to tender for the service.

The solution

Professionalism

Crown's proposal was successful in part because of its inclusion of services which would enhance and automate many existing processes.

Project meetings took place between Crown, the customer and the out-going supplier to agree on the best method to move the account. From the first, Crown took on all responsibilities of the account including managing service requests. Daily transfer of boxes began, with regulations to make certain each party was aware of its responsibilities.

The account was structured so that each department was treated separately to track its use of our services. Beyond accounting it was possible to have different indexing and service rules for each department. During the process some departments required detailed audits of their documents. Crown was able to undertake these audits in a controlled and methodical fashion, due to the way in which the account was structured.

All service requests and new item creation (including all data entry) became automated and, on a daily basis, all information electronically transferred to Crown to ensure accurate processing and preparation of services.

The service ranges from managing entire boxes, to individual documents. Individual sheets of paper are faxed back to the client (we offered scanning services, but the client preferred its phone line) and a full audit of this activity is achieved through Crown's IT systems. This practice became increasingly popular, with many documents now being sent in this fashion.

Seminar training was also given to the client's staff to make them aware of the services available, how to use them and of records management best practice.

Benefits

The service is now well established and our relationship very strong. Crown acts as the invisible partner providing the link between the staff at the Bank and their documents. All of the customer's staff can therefore concentrate on their core activities, leaving the records management services to the experts – Crown Records Management.

The power of memory

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