DOCUMENT DIGITIZATION ROADMAP

AN EXECUTION PLAN FOR SCALABLED, STRUCTURED DIGITAL RECORDS

3SG+

Knowing how to digitize is a matter of standards; knowing when and where to start is a matter of strategy. A well-planned digitization roadmap provides a phased execution plan to transition your organization from fragmented, paper-heavy operations to a streamlined digital environment.
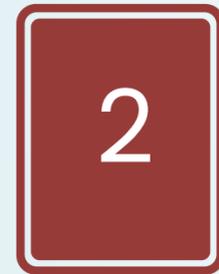
Phase 1: Assess & Prioritize

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- **Identify high-volume, high-friction processes** where paper creates bottlenecks.
- **Evaluate compliance-sensitive records** requiring immediate digital security.
- **Map current workflows** to see exactly where physical documents slow operations.
- **Define clear success criteria** for the initial rollout.

Phase 2: Standardize & Prepare

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- **Define document types and naming conventions** across the organization.
- **Establish metadata standards** to ensure files remain searchable.
- **Align retention policies** to ensure legal and regulatory compliance.
- **Assign clear ownership** for data quality and process management.

Phase 3: Digitize & Capture

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- **Scan and index documents** using high-fidelity capture protocols.
- **Apply OCR (Optical Character Recognition)** to make content fully searchable.
- **Validate quality and accuracy** through rigorous QA checkpoints.
- **Capture essential metadata** at the point of ingestion.

Phase 4: Integrate & Enable

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- **Connect digitized assets** directly to your ECM or line-of-business systems.
- **Embed documents into active workflows** to automate manual tasks.
- **Enable role-based access** to ensure security and ease of use.
- **Reduce reliance** on unmanaged shared drives and physical file rooms.

Phase 5: Govern & Optimize

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- **Enforce automated retention** and disposal policies.
- **Monitor usage patterns and system access** to maintain security.
- **Continuously improve workflows** based on user feedback and performance data.
- **Maintain audit readiness** with a clear, digital trail of all records.

Moving Forward with 3SG Plus

3SG Plus bridges the gap between document conversion planning and execution. We help organizations navigate each phase of this roadmap with a structured, scalable approach. We focus on the planning, standardization, and long-term governance required to ensure your digitization efforts improve your operations, not just your storage capacity.

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