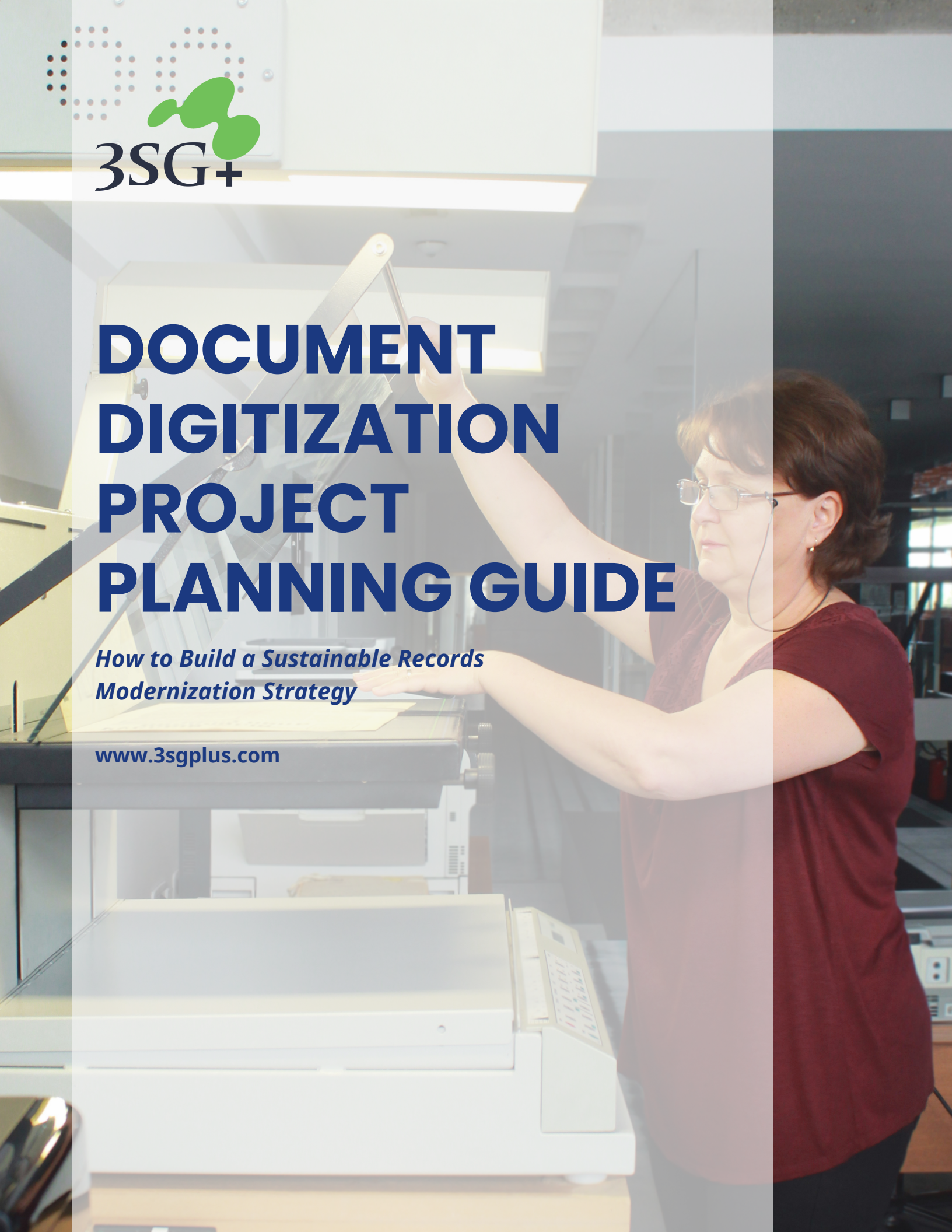




DOCUMENT DIGITIZATION PROJECT PLANNING GUIDE

*How to Build a Sustainable Records
Modernization Strategy*

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INTRODUCTION

Organizations today face a common challenge: decades of paper records stored across file rooms, warehouses, off-site storage facilities, and departmental archives. While many leaders recognize the need to digitize these records, the most successful initiatives begin with a broader question.

How do we modernize the way information is managed across the organization?

Digitization is often viewed as a scanning project. In reality, it is a foundational step in a larger transformation that improves access to information, strengthens compliance, increases operational efficiency, and prepares organizations for future technologies such as workflow automation, enterprise content management (ECM), and artificial intelligence (AI).

This guide provides a practical framework for planning, prioritizing, and executing a successful digitization initiative that delivers immediate value while supporting long-term modernization goals.

WHY DIGITIZATION IS MORE THAN SCANNING

Many organizations begin by focusing on paper. However, the real challenge isn't paper itself; it's the information trapped within it. Paper-dependent processes create operational bottlenecks that impact employees, citizens, and stakeholders alike. Staff spend valuable time searching for files, transporting documents between departments, and manually re-entering information into multiple systems.

The Hidden Costs of Paper

Paper records often create costs that are difficult to measure including

- Time spent searching for documents
- Delayed response to external requests
- Off-site storage fees
- Duplicate records and version-control issues
- Increased risk of loss or damage
- Manual processes that slow service delivery

Operational Challenges

Paper records can make it difficult to

- Share information across departments
- Support remote or hybrid work environments
- Respond to records requests quickly
- Maintain consistent record retention practices
- Protect sensitive information

Why Digitization Matters

When planned strategically, digitization creates the foundation for

- Improved information access
- Better records governance
- Enhanced compliance
- Workflow automation opportunities
- Enterprise-wide digital transformation

Scanning documents is only the beginning. The real goal is transforming information into a strategic organizational asset.

BUILDING THE BUSINESS CASE

A successful digitization project requires operational support and executive buy-in. Leadership teams are more likely to approve funding when digitization is connected to measurable business outcomes.



Reduced Retrieval Time

Employees can locate documents in seconds rather than minutes or hours.



Better Citizen Service

Fast access to information improves responsiveness and service delivery.



Enhanced Disaster Recovery

Digital records reduce the risk of information loss caused by floods, fires, environmental damage, and misplaced or missing files.



Lower Storage Costs

Organizations can reduce physical storage and warehouse costs, file management labor, and document transportation expenses.



Improved Compliance

Digitized records support retention schedule enforcement, strengthen audit readiness, improve records request responses, and provide more secure access controls.



Increased Productivity

Staff spend less time handling paper and more time serving citizens, customers, and internal stakeholders.

When building a business case, focus on three primary sources of return on investment: labor savings from reduced document retrieval time, storage reduction achieved through the elimination of physical records costs, and process efficiency gained through faster workflows and improved information access. Together, these benefits can deliver substantial long-term operational and financial value.

ASSESSING YOUR CURRENT ENVIRONMENT

Before digitizing records, organizations should develop a clear understanding of their current information landscape. Without this foundation, organizations often struggle to scope projects accurately. You cannot create an effective digitization strategy without first understanding your records environment.

QUESTIONS TO ASK:

How many records do we have?

Estimate the following:

- Number of file cabinets
- Boxes in storage
- Linear feet of records
- Digital files already in existence

Where are records stored?

Include:

- Department offices
- Storage facilities
- Archives and shared drives
- Legacy systems

Which departments rely most heavily on paper?

Look for areas where paper impacts daily operations.

Which records are accessed most frequently?

Focus on records that staff use regularly.

Which records have retention requirements?

Understanding retention obligations can help avoid unnecessary digitization.

THE IMPORTANCE OF A RECORDS INVENTORY

A records inventory provides the foundation for every successful digitization initiative. By documenting what records exist, where they are stored, who owns them, how frequently they are accessed, and what retention requirements apply, organizations gain the visibility needed to make informed decisions. A thorough inventory helps leaders accurately estimate project scope, identify high-priority records, allocate resources effectively, and avoid unnecessary scanning costs. A records inventory creates visibility into:

- Record types
- Volumes
- Locations
- Ownership
- Retention requirements

PRIORITIZING WHAT TO DIGITIZE

One of the most common mistakes organizations make is attempting to digitize everything at once. A better approach is prioritization.

EVALUATE RECORDS BASED ON:



Frequency of Access

How often are records requested or referenced?



Public Records Requests

Which documents are routinely requested?



Operational Importance

Which documents support critical business functions?



Physical Condition

Are records deteriorating or at risk of damage?



Compliance Requirements

Which records support compliance obligations?



Historical Value

Do records have long-term archival significance?

RECORDS PRIORITIZATION MATRIX

The goal is not to scan everything. The goal is to digitize the records that create the greatest operational value.

	High Access	Low Access
High Value	Immediate Digitization	Strategic Digitization
Low Value	Workflow Review	Evaluate before Scanning

Examples of High-Priority Records

- Property records
- Human resources records
- Merger and acquisition forms
- Permits
- Finance documents
- Intellectual property
- Court files
- Contracts / agreements
- Trade secrets

METADATA MATTERS

Organizations often focus on image quality and overlook metadata, which can undermine the value of the entire project. Poor metadata can turn a digital archive into a digital file cabinet that is just as difficult to navigate as paper storage.

What is metadata?

Metadata is information that describes and identifies a document. Examples include

- Document type
- Date
- Department
- Case number
- Property ID
- Employee number

Why metadata is critical?

Metadata determines how easily users can find, retrieve, manage, and use information over time. Effective metadata improves

- Searchability
- Retrieval speed
- Classification
- Compliance management
- Automation opportunities

METADATA BEST PRACTICES



Establish Naming Conventions

Define consistent standards that are easy to understand and maintain.



Create Indexing Standards

Determine which fields are necessary for retrieval and reporting.



Align Metadata with Processes

Metadata should support how users actually search for information.



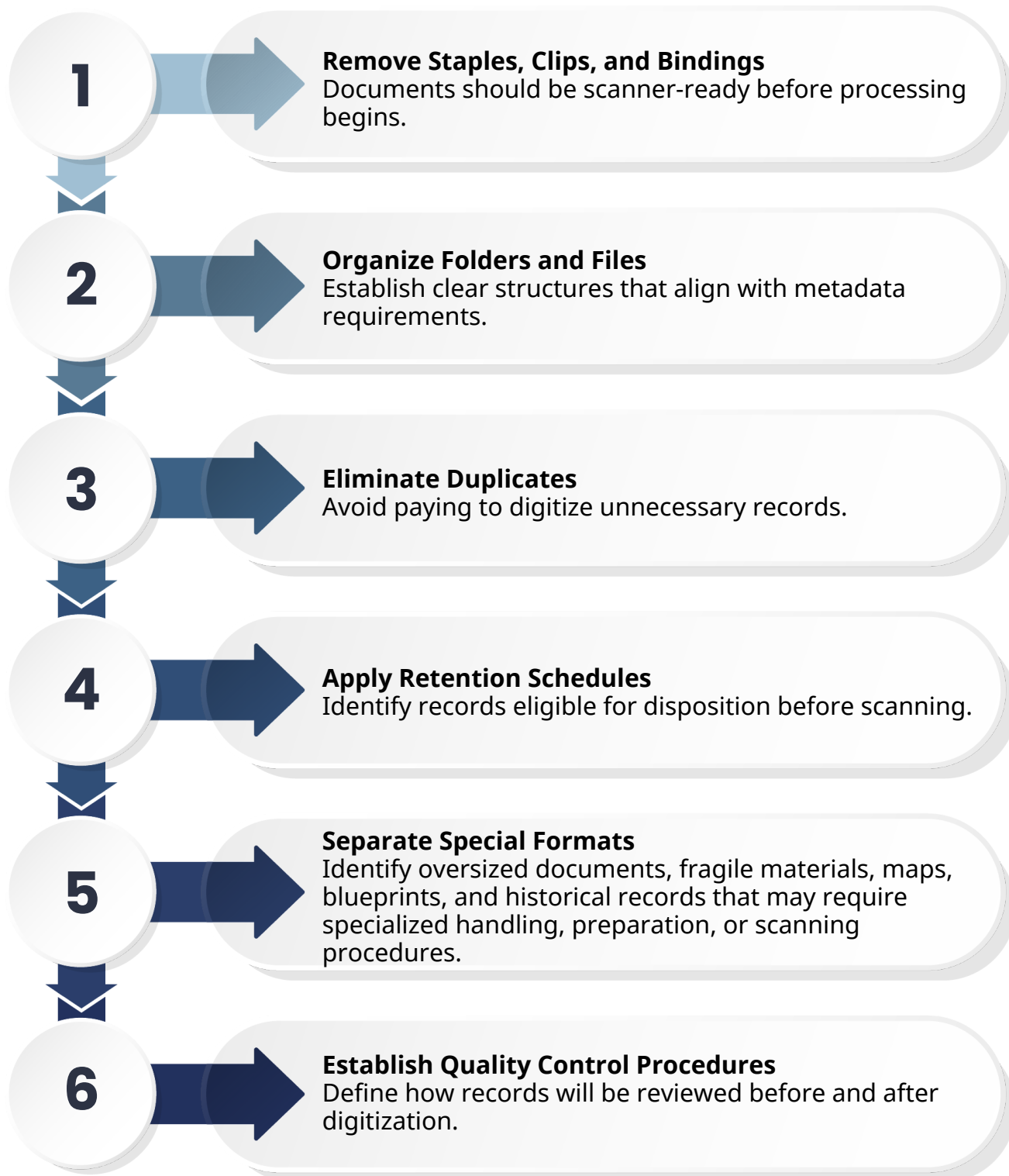
Plan for Future Growth

Metadata structures should support future ECM and workflow initiatives.

PREPARING RECORDS FOR SCANNING

Preparation is one of the most important factors affecting project quality, speed, and cost. Well-prepared records improve efficiency throughout the digitization process. Effective preparation reduces project costs while improving accuracy and usability.

RECOMMENDED PREPARATION ACTIVITIES

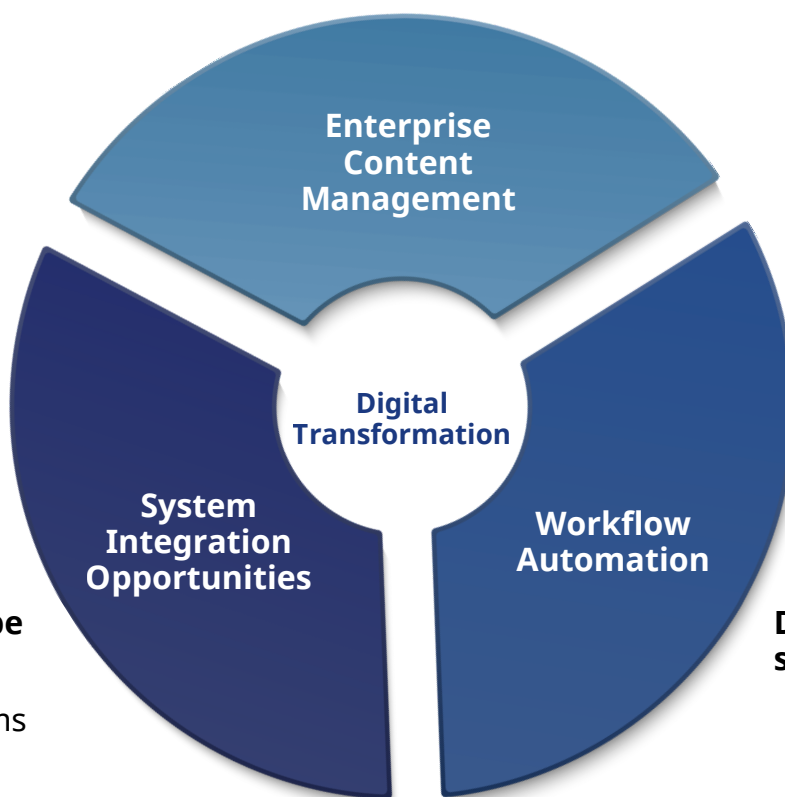


BEYOND SCANNING: CONNECTING INFORMATION TO BUSINESS PROCESSES

The greatest value of digitization is realized when documents become part of everyday operations. Digitized records should be accessible within the systems employees use every day.

ECM platforms provide

- Secure document storage
- Search and retrieval
- Records and retention management
- Governance controls



Digitized records can be connected to

- Permitting systems
- ERP platforms
- HR systems
- Financial applications
- Case management systems

Digitized documents support automation for

- Permit approvals
- Employee onboarding
- Accounts payable
- Case reviews
- Contract management

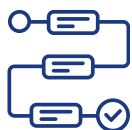
FROM IMAGES TO INFORMATION

The objective is not simply to create images of paper. The objective is to create information assets that support faster, smarter business processes. The most successful digitization projects create a bridge to ECM, workflow automation, and long-term digital transformation.

PLANNING FOR THE FUTURE

Digitization should be viewed as the first phase of an ongoing modernization journey. Organizations that plan beyond the immediate project position themselves for greater efficiency and innovation. Digitization is not the destination—it is the foundation for future modernization initiatives.

CONSIDER LONG-TERM GOALS



Ongoing Digitization Programs

Develop sustainable processes for incoming records.



Intelligent Document Processing

Automatically classify, extract, and route information.



Cloud-Based Information Access

Evaluate storage and accessibility needs as records volumes grow.



Information Governance

Establish policies that support compliance and accountability.



Artificial Intelligence Readiness

High-quality digital records provide the foundation for future AI initiatives.



Continuous Records Management

Modern records programs should evolve alongside organizational needs.

NEXT STEPS

Organizations that approach digitization strategically achieve greater value, stronger adoption, and better long-term outcomes.

- 1. Complete a Records Backlog Assessment:** Understand the scope and condition of existing records.
- 2. Inventory Existing Records:** Document record types, locations, and retention requirements.
- 3. Identify Priority Departments:** Focus first on areas with the highest operational impact.
- 4. Develop a Phased Strategy:** Break large initiatives into manageable milestones.
- 5. Evaluate ECM and Workflow Opportunities:** Ensure digitization supports broader modernization objectives.
- 6. Establish Governance Early:** Define ownership, standards, and accountability for long-term success.

Organizations that view digitization as a strategic initiative instead of a scanning project are better positioned to improve efficiency, strengthen compliance, increase information accessibility, and prepare for future innovation. By building a thoughtful digitization strategy today, you create the foundation for a modern information ecosystem that supports your organization for years to come.

3SG PLUS: LIBERATION FROM INEFFICIENCY



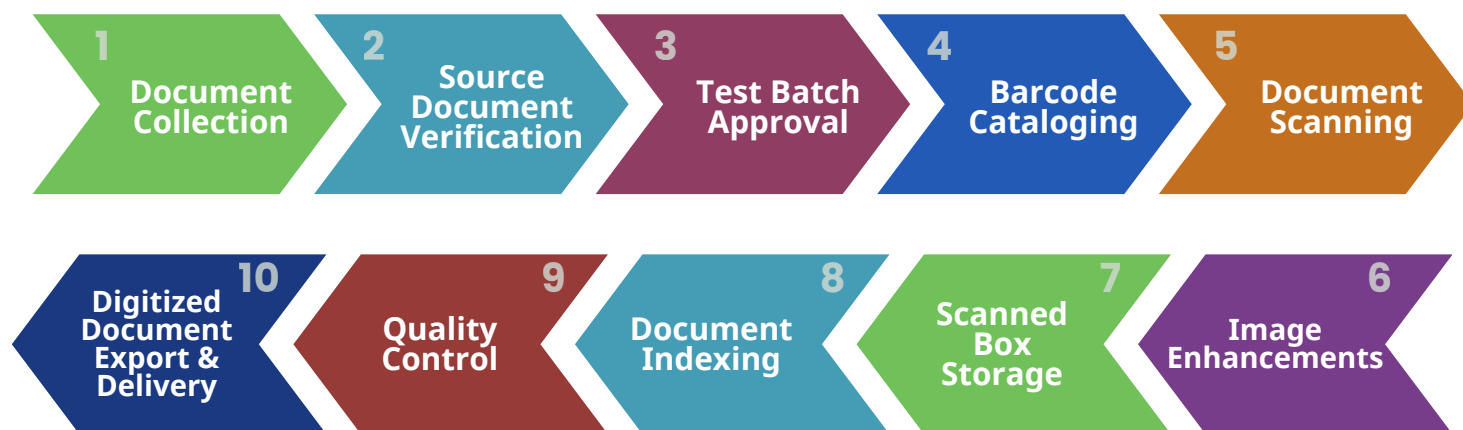
3SG Plus is a digital transformation specialist, technology reseller, and IT managed services provider headquartered in Columbus, Ohio. Our services include document imaging, enterprise content management, digital transformation, and cybersecurity. We are an authorized OnBase enterprise content management reseller, integrator, and professional services provider.

We specialize in secure and efficient document imaging, transforming physical files into high-quality digital formats. Our end-to-end solutions include prepping, scanning, quality control, indexing, and secure digital delivery to help organizations streamline document management and preservation.

Our team has 20 years of experience in providing document imaging and digital transformation services to public and private sector clients. Our expertise and comprehensive support services enhance operational effectiveness, boost transparency, and maximize the value and impact of their content management processes.

OUR PROCESS

We follow structured procedures and protocols for the acquisition, verification, and storage of physical and electronic documentation. Our comprehensive approach ensures the seamless digitization of documents and safeguards their integrity throughout the project lifecycle.



Ready to take the next step? Start with a **Records Backlog Assessment** and build a roadmap for long-term records modernization.

CONTACT US