



THE INFORMATION MANAGEMENT GROUP

## We ensure the data that matters most to our clients is protected yet readily accessible

### Case Study | Perpetual Guardian



#### The Company

As New Zealand's largest trustee for charitable trusts and established leaders in the estate planning industry, Perpetual Guardian has over 135 years' experience in providing expertise for clients. Perpetual Guardian offers services for the full suite of estate planning, including Wills, Trusts, Enduring Powers of Attorney, investment advice and support in philanthropic ventures. With 17 branches nationwide, Perpetual Guardian manages assets valued at over \$150 billion.

#### The Challenge/Need

When a devastating earthquake struck Christchurch, New Zealand, in 2011, the day-to-day operations of businesses and organisations of all sizes in the region were severely affected. This prompted Perpetual Guardian to review its existing document storage facilities and practices to minimise operational risks going forward. With increasing storage costs and less storage space within their own CBD offices, the team needed to ensure their files were stored safely and securely, but were also readily accessible in both physical and digital formats; not only as part of their normal business, but also in the event of disaster.

#### The Solution

Various ad-hoc storage arrangements were trialled by Perpetual Guardian to combat their document storage issues, including several internal file-digitisation projects, which proved challenging.

After a referral from another satisfied customer, Perpetual Guardian approached TIMG to scope a simple, enterprise-wide solution for their records management processes.

*By using smart document storage and imaging solutions we enabled cost-savings and streamlined efficiencies for Perpetual Guardian*

***“Even if you don't really know what you want to achieve with your record storage, digitisation or destruction, speak to TIMG – you will be pleasantly surprised with their fresh approach to some age-old problems.”***

- Matthew Pausina, Head of Operations, Personal Client Services, Perpetual Guardian.



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## The Solution Cont.

TIMG reviewed the project requirements as outlined by Perpetual Guardian and proposed a new, consolidated physical document-storage and digital-scanning solution which could integrate into existing file-imaging platforms.

The proposed solution enabled Perpetual Guardian to implement their 'Digital First' business strategy [which amongst other things drives the continual digitisation and imaging of historic records] and where necessary also enables the retention of physical files – usually for legal reasons. By using TIMG's online portals, SAFE Records and SAFE Digital, Perpetual Guardian achieved easy access to both their digital and physical files, simultaneously reducing their in-house storage requirements by at least 50%.

A cohesive but simple document retrieval system was also implemented by TIMG, allowing Perpetual Guardian to store, request, and access files as requested, based on:

- The frequency required for file retrieval and access
- The urgency of file retrieval

With an ever-growing portion of their database now easily available digitally, Perpetual Guardian can manage lodgements and retrievals of their physical documents from a centralised point to reduce costs and maintain database integrity.

## The Result

Perpetual Guardian has been using TIMG solutions since 2014 and has continued to experience cost savings and improved process efficiencies.

TIMG have enabled the Perpetual Guardian team to significantly improve their overall service proposition and delivery through:

- Reduced storage costs
- Maximising operational efficiencies as a single enterprise-wide supplier
- Improved delivery of service to customers due to custom indexing of digital files and files always being readily available [physically or digitally]
- Elimination of cumbersome manual tasks relating to the physical search for files and records

Perpetual Guardian has found it easy to engage with TIMG. "We can discuss challenges openly and with ease. TIMG have often seen the issues we are facing elsewhere and can then recommend a best practice solution on the spot" says Matthew Pausina, Head of Operations, Personal Client Services. "The TIMG team know how to manage a relationship. They keep in touch, listen to what we need, and use their experience to provide practical, cost-effective solutions".

TIMG delivered a cost-effective, highly streamlined physical and digital document storage solution to improve the service delivery to Perpetual Guardian clients. By implementing this solution, Perpetual Guardian has reduced time spent on manual file searches and have substantially reduced storage costs. They have also future-proofed their business against further document storage and retrieval challenges.

### Key factors in Perpetual Guardian selecting TIMG as a supplier were:

1. **TIMG's extensive nationwide storage facilities**
2. **TIMG's market leading, innovative digital solutions**
3. **TIMG's expertise in understanding and solving customer challenges**

**Talk to us to learn how TIMG implicitly understands and addresses your unique needs and why we are the preferred information management experts.**



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