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0800 SECURITY

CASE STUDY

Perpetual Guardian

When a devastating earthquake struck Christchurch in 2011, Perpetual Guardian sought to review its existing document storage facilities and practices to minimise operational risks going forward.

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 manages assets valued at over \$150 billion, and offers services for the full suite of estate planning, including Wills, Trusts, Enduring Powers of Attorney, investment advice and support in philanthropic ventures.

THE CHALLENGE

The devastating 2011 Christchurch earthquake 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.

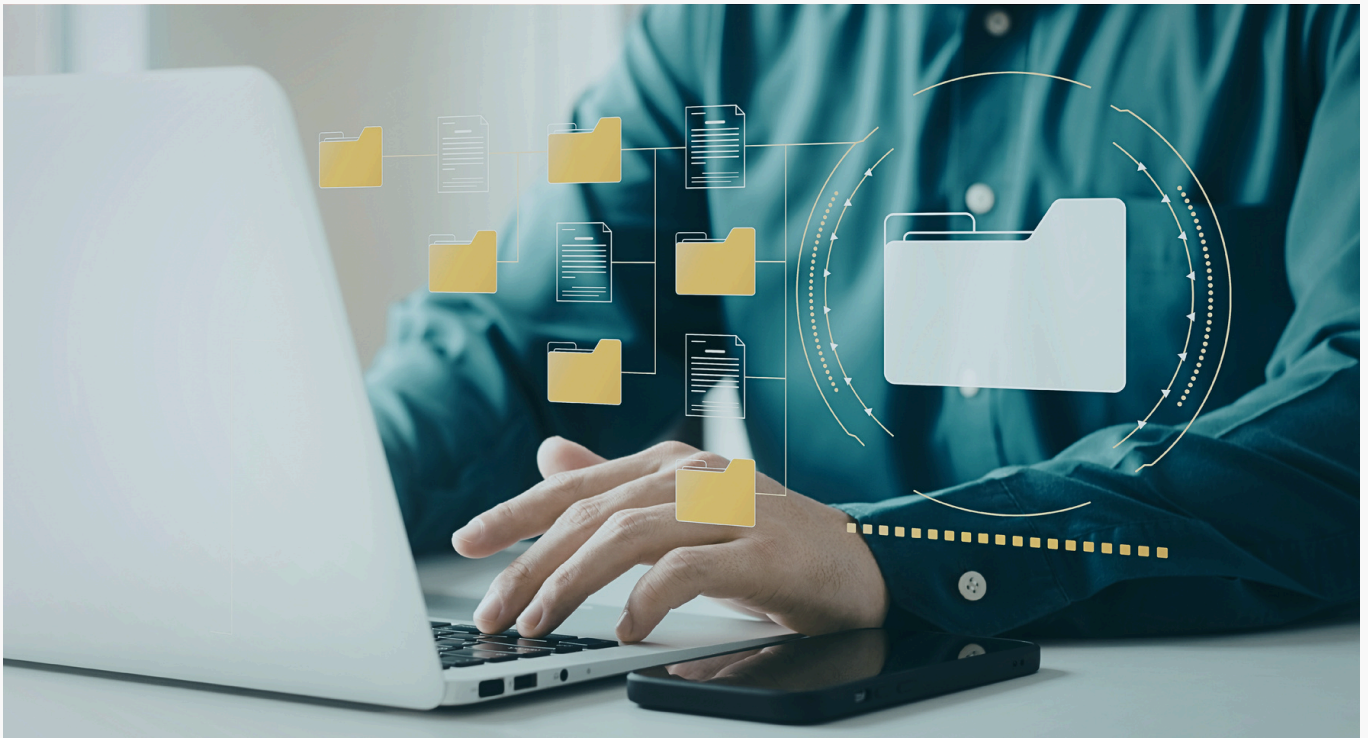
Various ad-hoc storage arrangements were trialled by Perpetual Guardian to combat their document storage issues, including several internal file-digitisation projects, which proved challenging. After a referral from another satisfied customer, Perpetual Guardian approached TIMG to scope a simple, enterprise-wide solution for their records management processes.

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

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

"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, Perpetual Guardian



THE SOLUTION

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, while also enabling 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

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.

“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. 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”.

- Matthew Pausina, Perpetual Guardian



TALK TO US ABOUT YOUR INFORMATION MANAGEMENT PRACTICES

We have been helping New Zealand businesses and government agencies manage their information for over 30 years.

From digitisation to records storage, secure destruction to enterprise data protection, TIMG's comprehensive range of solutions ensure that your data and information is always secure, yet accessible, and can be properly leveraged into a valuable resource.

Get in touch with our team today to make sure your information is working for you.

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