

## MAXIMIZE RM PROGRAM EFFICIENCIES WITH FUNCTIONAL CLASSIFICATION

Functional classification—it forms the foundation of a successful records management program, but what does it actually mean?

Simply put, functional classification allows you to systematically categorize various types of records based on business functions and activities. The benefits are many—from managing risk and compliance to improving access and collaboration as well as reducing unnecessary duplication of documents.

But getting the right system in place involves developing a holistic view of your RM program with respect to your business activities and the records, both paper and electronic, that support them. This is often a huge challenge in terms of time and resources.

### The TAB Process

That's where we come in. TAB's consultants have extensive experience developing functional classification systems across all industries and verticals. Here's what a typical engagement with us looks like:

- Conduct interviews with staff and review existing material to learn more about the organization and the information employees create
- Identify and name unique business activities
- Group activities together based on functions
  - For example: contracts are created, negotiated and signed in many departments, but all of them would be classified as "Legal-Contract Management" regardless of what business unit they are from



- The key is to keep it simple and consistent. Most companies should create anywhere from 8 to 12 functions that apply to all departments
- The resulting functional classification system is applied to every piece of information that is created
  - Filing, retrieving and archiving information becomes more efficient
  - Staff can easily identify and classify future records

If you would like to learn more about how a functional classification system can work for your organization, contact us today.

### About TAB

As the recognized leader in the records and information management industry, we develop custom solutions that enable our clients to control, store and access critical information. We offer top quality filing systems, media storage equipment and specialists that solve complex records and information management challenges. With more than 60 years of experience, we serve clients in a variety of industries including legal, finance, healthcare, insurance, manufacturing, education and government.



#### CONTACT ONE OF OUR REPRESENTATIVES TODAY.

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