

TAB Case Study: Pengrowth Corporation

Get TAB SMART for a Leaner Business

Nothing tests the limits of your records management like rapid growth. Pengrowth Corporation, a top North American energy trust company, had been expanding significantly for over three years before they merged and acquired a billion dollar asset in 2006, doubling their employee base in a year. Their records management program had really been challenged to meet the growing demands of the business, and they decided they wanted to develop a new records management strategy.



Together With TAB

On the basis of their existing relationship, Pengrowth decided to partner with TAB to develop a road map for a new RM strategy and determine what action had to be taken. Over a period of three months, the TAB team meticulously created a comprehensive road map, taking time to ensure that every aspect of the program, from compliance and risk management to access and storage footprints, was as strong as possible. While there were many RM priorities identified during this process, in light of the fact that Pengrowth would be moving to a new corporate headquarters, it was decided that implementing the TAB SMART program company wide would be a good start.

Why TAB SMART?

The TAB SMART (Streamline. Manage. Access. Retain. Toss.) program was designed to help organizations reduce the amount of material they retain. Essentially the program involves taking employees through a process of reviewing their record and non record material, determining what is not essential. This way non-essential materials, both paper and electronic, can be eliminated, reducing storage costs and streamlining information access and retrieval time.

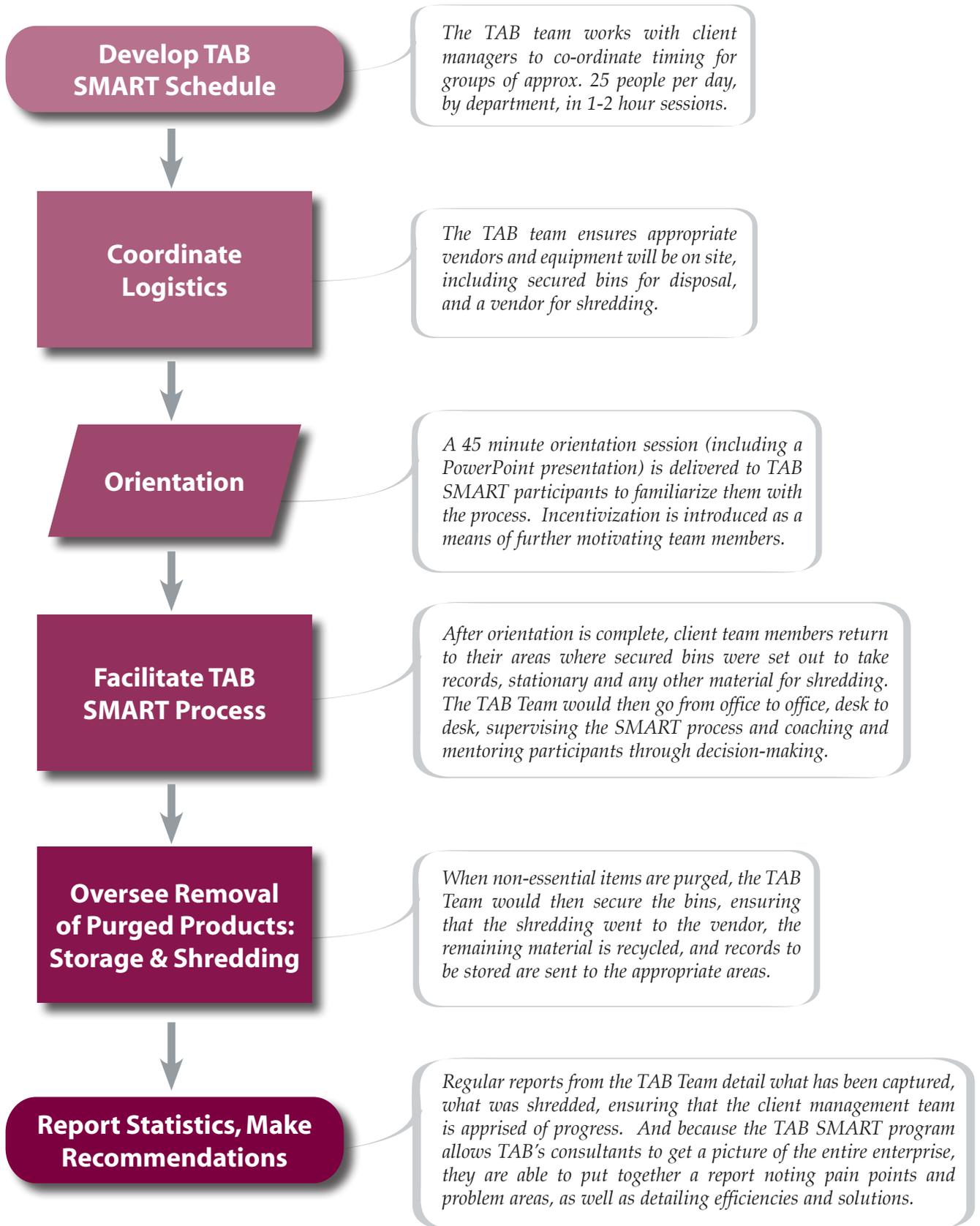
The TAB and Pengrowth teams recognized that implementing TAB SMART would have three major benefits:

- Help raise profile of the internal records management team, demonstrating their competencies, services and role both currently and going forward, showing how they can support Pengrowth's entire organization
- Give both teams the opportunity to be in every office across the organization, to understand and observe current RM practices and identify opportunities to streamline
- Lighten the load, so only business critical material would be moved, creating a lean mean business machine

Getting SMART

Both teams worked together to prepare for the implementation of the TAB SMART sessions. Communication is a critical part of the process, and both TAB and Pengrowth created and maintained an excellent dialogue before, during, and after the sessions. When all elements were ready, the TAB SMART process began, as illustrated in the following diagram.

The TAB SMART Process



The process is designed so that once the day is done, there is no discernable impact and business can proceed as normal.

“We not only designed a roadmap for records management going forward, but by getting rid of a lot of non-critical material, we are a leaner business.”



Wins & Unexpected Finds

The TAB SMART program yielded some great results, as well as some unexpected finds:

- A total **6500 cubic feet** of paper was removed, 50% of that shredded, with 2500 cubic feet being garbage, like published material
- **495 cubic feet** of inactive records were transferred to lower cost storage
- **385 cubic feet** of excess stationery were recycled
- **18 cubic feet** of cds and dvds were destroyed
- **82 pieces** of surface furniture, (bookcases, cabinets etc) removed saving **\$61,500** through re-use

Motivation

Incentivization plays a critical part in moving the TAB SMART process along: team members are issued “TAB Bucks”, and when certain benchmarks are hit, e.g. if someone clears a cabinet, they would receive one hundred TAB Bucks, amounts are tracked by TAB and prizes are awarded by Pengrowth at the end of the process.

Reporting & Communication

The TAB team made sure the Pengrowth management team was kept apprised of progress through regular reports detailing what had been captured, what was shredded and so on. And because the TAB SMART program allows TAB's consultants to get a picture of the entire organization, they were able to put together a report noting pain points, problem areas, as well as detailing efficiencies and solutions.

The Pengrowth team came up with the excellent idea of putting plans, expectations and progress reports into their weekly newsletter, so that every team member was always up to date.

Building on Progress

The TAB SMART project at Pengrowth was a total success, with TAB and Pengrowth bringing their strengths together to complete the project on time and on budget. The level of support and participation from Pengrowth was singular, particularly from the leadership team and facilities group, not to mention the enthusiastic involvement of every single one of the Pengrowth team members.

As Bernadette Resnik said, “ We accomplished what we set out to, not only designing a roadmap for records management going forward, but also by getting rid of a lot of non-critical material, we are a leaner business, and it puts us in a great position for our upcoming move.”

If you'd like to learn more about how TAB SMART can help your organization get rid of unnecessary records materials visit www.tab.com



CONTACT ONE OF OUR REPRESENTATIVES TODAY.

UNITED STATES	• 888.822.9777	www.tab.com
CANADA	• 800.387.6212	www.tab.ca
AUSTRALIA	• 800.50.3453	www.datafile.com.au
EUROPE	• +31 20 6975333	www.tab.nl