

# CASE STUDY

Records Management Automated: LOTT Case Study



CUSTOMER PROFILE  
LOTT Clean Water Alliance

INDUSTRY  
Local Government

SIZE  
85 Employees

TECHNOLOGY USED  
RecordPoint  
SharePoint 2013  
FileConnect  
Physical Records Module

## LOTT CLEAN WATER ALLIANCE MODERNIZES RECORDS MANAGEMENT WITH AUTOMATED COMPLIANCE

*LOTT Clean Water Alliance's (LOTT) 2013-2018 Performance Plan contained an objective that outlined the need for a modern application to manage their growing dataset. The objective was to establish a more efficient records management system that would reduce liability and risk for the organization.*

*A project to overhaul records management processes, aptly titled "Get to the Point," LOTT envisioned a centralized, legally compliant record storage system with advanced search capabilities to improve efficiency.*

### MAIN CHALLENGES

- Manual processes to manage rapidly growing electronic content repositories
- Variety of management and storage processes and file structures across internal departments and individual staff members
- Difficult and time-consuming search efforts to identify the right record within various departmental file structures for both internal staff and fulfillment of Public Records Act (RCW 42.56) requests
- Inconsistencies in the management of document lifecycles across the organization

### RESULTS

- Faster and more comprehensive fulfillment of Public Records Act requests
- Reduced time spent by staff on searching for records needed to accomplish their jobs
- Leveraged existing SharePoint system that improved adoption across the organization and integrated multiple systems together
- Increased user adoption and lessened additional training due to retaining the familiar SharePoint user experience

## IMPLEMENTATION AND EARLY RESULTS WITH RECORDPOINT

LOTT has a small and agile team dedicated to managing records across the organization. As they evaluated seven vendors to help them fulfill their vision, the only vendor that fully met their needs was RecordPoint. Natalie Windle, LOTT's Public Records Officer, pointed out that the "key was RecordPoint leveraging the existing SharePoint experience, continuing the momentum that we had built. User adoption was important. They didn't create another silo for us, which was appealing."

LOTT is also leveraging RecordPoint's wide selection of connector endpoints to cover more content services and continue growing their records management deployment. They can bring in various types of records, including physical records, file shares, and more. Later, if they decide to deploy Office 365 or a hybrid model, RecordPoint can manage those content sources as well.

Like many organizations, LOTT's manual records processes struggled to keep up with the electronic world. This presented risk and challenges for their records management team, who have been manually managing their growing content repositories. Before RecordPoint, Natalie would "walk around with a piece of paper listing documents/files to be managed and getting approval signatures on it...think of the time that it takes everybody. How many different conversations that is and how many levels of approval."

As a public agency, LOTT puts much effort towards maintaining compliance with the Public Records Act. "We need to be able to provide records to people when they ask for them. Our response needs to be accurate, complete, reliable and timely. RecordPoint has increased our confidence in our records request responses." - Natalie Windle, Public Records Officer of LOTT

Before RecordPoint, identifying the right record in different departmental file structures and locations was difficult and time-consuming, involving manual reviews of multiple untracked record versions. Of the first pilots that have been deployed, Natalie and her users have nothing but praise for their new experience. Natalie explains, "If I know where the official record copy of a document is located, I can go right to it. With less information to search, we are going to be able to respond quicker."

LOTT is currently rolling out a deployment of RecordPoint across all their teams and departments, and end-user feedback has been very positive. With almost 200k records, 800 files and 600 boxes managed in-place by RecordPoint, "people are surprised on how little they're impacted so far," Natalie expressed.

"Except for the supervisors or those that need to approve disposition of records, users don't need additional training beyond SharePoint, which they have used for years... It's not a brand new system to learn." Natalie continued, "It's just training people on what we already have. That has helped greatly with adoption."

Overall, LOTT and Natalie have justifiably high hopes for the success of their project, and they trust RecordPoint to help them in their journey. "I feel we were educated with what RecordPoint had to offer, and I feel like the results so far have justified our choice to use this product. The result is what I expected and what it was set up for."



## ABOUT RECORDPOINT

Founded in 2009, RecordPoint is a global records management and compliance solution provider and pioneer of cloud-based recordkeeping. As recognized by Gartner in 2018, RecordPoint is leading the way in the content services segment and providing organizations with the ability to truly manage records from across multiple services and platform using a single, federated solution.

With support for Office 365, SharePoint, File Shares, E-mail, Box, Dropbox, G-Suite and many other applications, RecordPoint is demonstrating how easy federated compliance can be with a modern, trusted cloud solution.



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