



## Iron Mountain — Information Management As You Like It

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### Management Summary

For many people, the concept of information management evokes images of storage arrays, tape jukeboxes and libraries, file cabinets of paper, libraries full of books (for the traditionalists), and perhaps, stacks of thumb drives and removable media as the enemy. From this perspective, it is all about the physicality and how to arrange it – in tiers, in remoteness, or to optimize for space, protection, or ease of use. This approach can be contrasted with that of people who see the concept of information management in presentation terms – in the eye of the beholder, so to speak. This second perspective focuses on videos without jitter, visualization of vast data sets, search results, and the browsers that enable information to be presented to a variety of end points. Presentation-focused information management has a different set of vocabulary – ask any teenager. Its priorities are targeted at immediacy and satisfaction.

There is a third approach to information management that rests on the two described above. It optimizes the usefulness of many kinds of information for many kinds of audiences and uses. This is the world of indexes, bibliographies, tags, and other tools that enable a *particularity* and *completeness* of finding. This approach focuses on metadata – information about information that generally comes in conceptual lists of important terms (taxonomies), hierarchies (often trees), or networks of links and/or relationships. It is what underlies innovation. It is what really matters to most businesses.

Iron Mountain has been archiving information as a service for many decades. Their heritage business in paper records, more recent expansion into digital information, and expertise in records management, lets them support the precision and completeness of find to keep the costs or retrieval under control<sup>1</sup> – but corporate information now goes far beyond formal records. So, recently, Iron Mountain has invested in harvesting metadata as information (paper, electronic, etc.) is ingested – which is when the full context remains intact. The completeness of this metadata allows for aggressive single instancing and compression of digital information. It allows non-digital information to be found and digitized as needed. It allows the services this metadata supports to be location and media agnostic.

For organizations producing more kinds of information – and particularly for those facing increased risk and threats of litigation – the usability of corporate information is key to planning proper strategies and implementing operational efficiencies. The kind of well-managed archive process that Iron Mountain provides is better than simply adding more storage. For more about Iron Mountain's approach, please read on.

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<sup>1</sup> Keeping something is relatively painless, but finding it tends to be hard. Iron Mountain estimates it can cost 20 to 500 times more to touch a stored piece of information once than to store it for twenty years.

## Not Your Usual Technology Service

Iron Mountain leverages technology and provides technology services, but it is not a typical technology company in that it does not sell hardware or software. Because of its heritage in the storage of physical records, CEO Bob Brennan calls Iron Mountain *a real estate company whose tenants are records that stay an average of seventeen years*. Like other technology companies, it has grown by acquisition. It has little debt and no desire to change its business model – or be acquired. Its many sophisticated data centers act as a system of clouds. By its nature, it provides long-term services, and has learned to do them very well. It is trusted. It knows each customer is unique and works with them to provide the information services that will give them the best leverage of their corporate information in how they do business.

## Managing Information for Re-Use

Topographically speaking, Iron Mountain has been providing cloud services for decades. However, as many new cloud providers are discovering, the time-and-money-saving automation of cloud self-service is consumed most effectively in conjunction with key local capabilities and controls. These local capabilities typically are particular to a situation.

With its *Connected*, *Live Vault*, and *Mimosa* acquisitions, Iron Mountain can protect information in laptops to *Microsoft SharePoint* repositories and from remote offices to data centers or clouds. In addition, it can harvest metadata from information it does not yet hold in its repositories.

This harvest of metadata can be tuned to support particular business processes, such as FDA approval or early case assessment for eDiscovery. It can be more pervasively targeted to document compliance for a particular organization that has a unique profile of regulations with which it must comply. It can also provide, as it has for decades, the classic records management capabilities that support operational transparency. Iron Mountain also has many media customers who require a more classic content management approach.

In all cases, the metadata becomes a valuable and protected business asset that allows the fullness of business information to be used. In all cases, Iron Mountain's search capabilities, from its *Stratify* acquisition, can be used to leverage metadata fully for a particularity of

find. The following three elements of Iron Mountain intellectual property are critical to how Iron Mountain delivers tailored services on a massive scale.

### 1. Policy Management

Policies are developed in conjunction with each client to match operational needs and the profile of institutional risk. Much of Iron Mountain's consulting is in this area. Its broad experience over decades with large companies has given it a unique understanding of the perils and good practices of policy design for information management.

### 2. Intelligence Extraction

Iron Mountain's advanced *Look Into* technology provides granularly-focused information analytics and metadata extraction functions. These include indexing, entity extraction, and language detection. Once all the metadata that characterizes the content has been extracted, Iron Mountain de-duplicates and compresses the information for efficient archiving.

*Look Across* is a technology applied to a collection of documents or other information types to develop in-depth understanding of the relationships within the collection. Examples of *Look Across* include concept clustering and e-mail conversation threads.

*Look Into* and *Look Across* can be done at the edge of the network (e.g., at the branch office) by Iron Mountain's *Classify & Collect* software. It can also be accomplished on-premises by *LiveVault* and *Mimosa NearPoint*. Iron Mountain can extract intelligence from information it does not hold, under a service contract. It can extract it from data held in a storage cloud. It is working on extracting these kinds of data and imposing policies on data from multiple clouds. Similar functionality for physical records and tapes is provided by *Iron Mountain Litigation Solutions* using its *Accutrac* software. The flexibility of providing information management services where the data resides, on-premises or in the cloud, is what Iron Mountain characterizes as *Location Agnostic*.<sup>2</sup>

These intelligence harvesting and compression efforts are similar to the energy conserva-

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<sup>2</sup> Iron Mountain's companion catch phrase, *Media Agnostic*, refers to the breadth of media Iron Mountain will manage, from paper to tapes to disks – and also photographs and other special need collections. Iron Mountain has digitization services for paper records, but finds that rampant pre-emptive digitization is not cost effective – just-in-time digitization works better.

tion efforts of electric companies. They are good for the customer and they help Iron Mountain run a more efficient business.

These three elements are built into Iron Mountain's information management services. This lets Iron Mountain offer a flexible array of service components. Its customers can get *As You Like It* service.

### As You Like It

Iron Mountain provides information management capabilities on its customer premises or in the cloud. Consider the business value amplification given by this flexibility in key Iron Mountain use cases.

#### *The particulars of Early Case Assessment and Legal Review: Bipolar Requirements*

eDiscovery actually falls into two parts, each of which has different requirements.

- **Early Case Assessment** involves the identification of potentially relevant content. Data volumes are reduced by narrowing searches based on such attributes as date and file type, and identifying key words and custodians that indicate relevance to the issue at hand. Tools have been lacking to do this well – but the Faceted Search of the Iron Mountain eVantage appliance accomplishes this complex sorting efficiently and in an auditable fashion. Of course, this kind of guided process must be followed by assessment and validation, but the validation is easier on organized and pre-sorted results.
- **Legal review** is the follow-on process, but here the requirements are quite different. Optimizing attorney productivity using the advanced capabilities of the hosted *Stratify Legal Discovery service* can reduce the total cost of review. This hosted legal review service provides the high level of security that law firms and their clients require.

#### *Pragmatic Options for eMail and SharePoint Archiving*

Microsoft *Exchange* and *SharePoint* are two applications subject to hard-to-manage growth. Archiving is a good option. *Mimosa Near Point* is Iron Mountain's on-premises solution. It also offers similar functionality in its hosted *Total Email Management Suite*. For SEC-compliant companies, Iron Mountain offers *Digital Record Center for Compliant Messaging*, which also is hosted at Iron Mountain's secure data centers.

Depending on the nature and topography of

your organization, you will want one, the other, or a hybrid of both. The underlying *categorization and classification* software provides consistent results across all sources.

### Compliance

The nature of documenting compliance tends to be similar in the area of financial reporting, but disparate by industry and nationality in other operational areas. Iron Mountain has been addressing its customers' compliance requirements for decades. Its repositories include specialized archives for health care, media, email, and other kinds of content with special needs. Its *Health Scale* rating of its customers' records management maturity lets it target classification to where it is needed. Again, the separation of the intelligence extraction and policy management make documenting compliance by organizations with a range of records management maturity more feasible.

### Conclusion

In its approach to Information Management, Iron Mountain has leveraged the breadth of its customer base to create what is needed to make a broad and eclectic range of corporate information assets useful in an affordable way. It provides the tools to optimize key organizational information management imperatives. It uses common tools to produce consistent metadata by which data reuse is optimized. It offers many options that allow its customers to focus on their particular areas of risk. Iron Mountain's strategy of options and overlay functionality will satisfy the particular needs of a wide variety of customers. If you want a solution built on experience, consider Iron Mountain.



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