

# California developer

## Client profile

An agricultural and development company

## CASE STUDY



### Situation

In 2008, a California ranch reached an agreement with five of the nation's largest environmental organizations on a conservation and land use plan. The plan called for the permanent conservation of up to 24,000 acres, to be managed by the company and a private conservancy for the development of a new state park.

The ranch would continue to use the land for farming and ranching, as well as hunting, mining and oil production. In addition, the ranch would be able to develop an industrial complex, a business park along the interstate; an environmentally sensitive mountain resort; and a self-contained sustainable community of 23,000 homes that includes schools, businesses and public services.

In order to manage the wide-ranging activities and the sheer volume of record types needed for regulatory compliance, litigation readiness, and day-to-day business activity the decision was made to hire a Director of Records and Information Management (RIM).

The newly-hired director needed to quickly develop a RIM program that could:

- Ensure efficient, expeditious access to records
- Maintain the security of the company's records
- Support compliance with regulatory requirements
- Provide access to records from anywhere at any time

The director sought the guidance of Pitney Bowes Management Services (PBMS) in developing a comprehensive records management strategy.

### PBMS solution

The first task was to develop a project plan for tracking progress and a reporting tool to provide the client's management regular updates. The Director of Records and Information Management relied on PBMS for their expertise in RIM policies and procedures, business process workflows, technology recommendations and training support.

The director and PBMS partnered in the creation and implementation of a records infrastructure to:

- Review and update the corporate records retention schedule
- Develop a strategic plan for enterprise content management (ECM) implementation
- Create records management policies and procedures
- Develop enterprise-wide document workflow processes
- Utilize technology solutions to fit the development's needs
- Create and roll out an employee training program
- Identify and implement back-file conversion projects

### Results

The 18-month implementation is on target and the client is on mark to achieve the enterprise's goals.

### Benefits

- Created a defensible records compliant program.
- Improved access to records including remote access.

### Pitney Bowes Inc.

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For more information call  
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