




Fundamentals of

**RECORDS CENTER
MANAGEMENT**

Workshop

Records storage is a dynamic industry with great growth potential. Learn how to do it better, faster and more profitably by attending this event!



The purpose of this workshop is to provide solid fundamental skill training in commercial records center management. This program is specially designed for persons who are new to the industry. The curriculum is focused on new hires for long-standing businesses or persons who have only recently entered the commercial records center industry, (or persons who are planning to enter the industry). This two-day event is designed to cover all major areas of operations, sales and marketing at a fundamental level. Attendees should leave this event with a broad understanding of all areas of records center management.

This two-day workshop is arranged by functional area; functional areas include: economics, transitioning from related businesses, facility planning, codes compliance, records center operations, market analysis and prospecting, contracts and legal issues, PRISM International resources, an open question forum, and a tour of an operating facility. In addition to excellent educational content, attendees can anticipate excellent opportunities for networking with members of the faculty and with other attendees.

TOP 10 REASONS TO ATTEND:

- All presenters are experienced industry operators
- Learning how to maximize annuity revenue builds overall business value
- Comprehensive curriculum covering all aspects of fundamental records center operations
- Frequent opportunities for Q & A and interaction with presenters
- Special incentives for membership in PRISM International provided at event
- Enhanced supplemental resource materials available at event for companies who join PRISM International onsite
- Outstanding opportunities for networking between sessions and during meals and reception
- Substantial workbook materials and take-home resources
- Low price of event provides exceptional educational value
- Convenient location with easy airport access

PRISM International and its Task Group on Membership (TG7) planned this event. Content and presenters have been selected based on their degree of industry experience and expertise in the subject areas explored in this workshop. Here are some comments from members of the planning group.

“As a part of the planning task group for this workshop, we have worked to make sure that there is comprehensive coverage of all basic issues related to records center management. I have worked with PRISM International members for more than 20 years. The presenters at this conference are not only very experienced operators, they are also genuinely nice people who will take the time to share their experience with you. I know you will leave this conference with a wealth of information that you can apply immediately, and valuable relationships built over the two days of this workshop.” Lori Palmer, REB Storage Systems International

“After twenty plus years now in records management, I can certainly attest to the education benefits, knowledge sharing, invaluable relationships and the vendor partnerships that come primarily through my involvement with PRISM International.” Jim Teske, President, RecordMax USA

**Enroll Today! Fax Registration Form to +919-771-0457
Online at www.prismintl.org or Call 1-800-336-9793**

**MONDAY
NOV 3, 2008**

EDUCATIONAL SESSIONS/SCHEDULE OF EVENTS

8:30-9:00am
Registration and Continental Breakfast

9:00-9:15am
Welcome, Introductions and Overview of Events and the Industry:

Jim Booth, PRISM International

In this session, attendees will receive background and brief history of the industry along with

9:15-10:00am
The Economics of Commercial Records Storage:

Dennis Barnedt, Access Information Management

In this session, the financial business model for commercial records storage will be explored. This session will discuss:

- Commercial records management business model
- Storage revenue characteristics
- Service revenue sources
- Initial expenses and barriers to entry
- The annuity revenue model
- Capital scarcity, tight labor, economic downturn and its impact on the business
- Density and scale as drivers of revenue maximization
- Pricing methodologies

10:00-10:45am
Transitioning From Related Business Types:

Jim Teske, RecordMax USA; John Bauknight, Total Records and Information Management; John Yelland, Pouch Records Management

- Transitioning to records storage from moving and storage/removals
- Transitioning to records storage from confidential destruction
- Transitioning to records storage from self-storage

10:45-11:00am
Refreshment Break and Networking

11:00am-12:00pm
Facility Planning Panel Discussion:

Dennis Barnedt, Access Information Management; John Bauknight, Total Records and Information Management; John Yelland, Pouch Records Management; Chris Pearson, Vanguard Archives

This session provides a discussion of major issues to consider when leasing or purchasing a commercial records facility. During this session you will learn:

- Suppliers to the industry and sources for help
- Racking options – catwalk systems vs.

- order picker systems
- Space allocation and carton configuration systems
- Security and visitor control
- What to consider when leasing a facility
- Expansion of an operating facility
- Relocation of a records center to a new facility

12:00-1:00pm
Group Luncheon and Networking

1:00-1:30pm
Codes Compliance and Regulatory Issues:

Neal Goldman, Iron Mountain

In this session, issues related to fire codes, building codes and other compliance issues will be discussed. In this session you will learn:

- Fire codes and suppression systems in common use
- Structural considerations and building codes issues
- Building and occupancy permitting process
- Client-driven regulatory compliance issues
- Washington Update

1:30-3:00pm
Facility Operations:

Chris Pearson, Vanguard Archives

In this session the fundamentals of records center operations will be discussed. Items to be covered include:

- Organizing the facility
- Identification and location of carton inventory
- Workflow, which includes
 - o Setting up new customers
 - o Intake of new cartons
 - o Shelving new cartons
 - o Retrievals – cartons vs. files
 - o Refiles – cartons vs. files
 - o Receiving and fulfilling customer requests
 - o Pickup and delivery processes
 - o Driver security procedures
 - o Safety concerns and hazard mitigation

3:00-3:15pm
Refreshment Break and Networking

3:15-4:15pm
Software, Barcoding and Hand Scanners:

Jim Teske, RecordMax USA

This session will explore how software and related products and tools including bar coding, RFID tags, hand scanners, and reports are used to manage the records center facility. In this session you will learn:

- Barcode symbologies commonly used

- RFID tags and effective applications
- Basic software functionality
- Error trapping and hand scanning procedures
- Report generation and use
- Resources and vendors

4:15-5:00pm

Case Study - Surviving a Disaster:

Jim Teske, RecordMax USA

In this session, attendees will learn appropriate planning methods and mitigation

strategies for managing disaster incidents. This is a case study of an actual disaster event involving work disruption caused by a tornado. This session will explore preparations taken prior to the disaster, response strategies to the disaster, client communication strategies, business resumption, and lessons learned.

5:30-7:00pm

Networking Reception

**TUESDAY
NOV 4, 2008**

7:30-8:00am

Continental Breakfast and Networking

8:00-9:00am

Finding Customers:

Martha Mayer, Business Data Record Services

In this session, attendees will be guided in methods to assess market strength and to qualify potential clients. This session will cover:

- Market research techniques and resources
- Telemarketing services
- Prime customer identification
- Web-based lead generation
- Positioning yourself in the marketplace
- Creating a market niche among existing competitors
- Developing a marketing plan and strategy

- HIPAA Business Associate Agreement
- Gramm Leach Bliley Addendum
- FACTA Compliance
- The PRISM International Standard Storage and Service Agreement

11:30am-12:15pm

What PRISM International Can Do For You:

John Ulmer, PRISM International

This session will review the benefits of membership in PRISM International.

Attendees will learn:

- Costs and benefits of membership
- Services and resources offered
- Working with resources on the PRISM website
- PRISM International conferences
- Mentoring program
- Special incentives to join PRISM International

9:00 -10:15am

Selling and Sales Staffing:

Ken Hopkins, National Records Centers

This session explores selling strategies, sales staffing issues, and frequent points of objection and customer confusion. Attendees will learn:

- Prospect assessment techniques
- Identifying what you sell
- Identifying what customers buy
- Features and benefits
- Managing the sales cycle
- Basic selling skills and closing techniques
- Identifying good sales candidates
- Sales compensation
- RFPs and RFQs and how to respond

12:15-1:15pm

Group Luncheon and Networking

1:15-2:30pm

Closing Panel Discussion:

All Presenters

In this final session, an open forum will be presented to allow attendees to ask any questions not covered previously in other sessions, or to explore some issues in greater detail. General feedback on the conference will also be gathered at this time.

10:15-10:30am

Refreshment Break and Networking

10:30-11:30am

Legal Issues:

Jim Booth, PRISM International

In this session, attendees will learn the fundamental legal issues related to the commercial records industry. This session will explore:

- Limitation of liability
- Declaration of excess valuation

2:30-5:30pm

Optional Tour of Assured Record Storage

Following the adjournment of the conference, conference attendees are invited to tour an operating records center facility in Altamonte Springs. Opportunities for questions will be provided during the tour.

Due to limited meeting space, conference attendance is restricted to 100 attendees

SESSION PRESENTERS

Dennis Barnedt is founder and President / CEO of Access and is based in the San Francisco Bay Area. Over the past 18 months Access has grown into a leading regional records management company serving over 2,000 clients with 6 locations. Dennis has over 12 years of experience in the commercial records management industry, having held senior executive and management positions with First American Records Management (FARM), Iron Mountain, and Archive America, prior to founding Access in 2004. Dennis currently serves as Vice President of PRISM International.

John E. Bauknight, IV founded Shred First, LLC in 1997 with his partner & brother in law Nick Wildrick. John has handled the sales and marketing responsibilities of the business from the beginning. Shred First, LLC started as two men, a truck, and a shredder and with only two accounts. The company now has three (3) product lines, document destruction (on and off site), product destruction (Smart Business Magazine named Shred First the "King of Non-paper Destruction" in its December 2001/January 2002 issue) and general recycling services. In just a little over five years John has led the growth of Shred First, LLC's customer base to over 500 regularly serviced customers.

Jim Booth is Executive Director of PRISM International. He is the chief staff officer of the association, which serves commercial information management companies in more than 60 countries world-wide. Prior to joining PRISM International, Booth was the Executive Director of the NRCC, a consortium of commercial records centers and also served as Director of Marketing for ARMA International.

Neal Goldman is Vice President of Business Services for Iron Mountain Corporation Neal is primarily responsible for business development and government relations. Former owner of Allsafe and 20 year veteran of the information management industry, he has been an active Association member since 1989 and is currently serving as President of PRISM International.

Ken Hopkins is Vice President Sales for National Records Centers and is responsible for the pursuit, negotiation, and implementation of national and regional contracts for carton and media storage, destruction, imaging and other RIM services. Ken is also a former trainer and search consultant with a focus in the Records Storage Industry primarily for sales and customer service. He is a past president of ARMA International and has been a frequent presenter at both ARMA and PRISM International conferences.

Martha Mayer is the Vice President of Sales for Business Data Record Services in Minneapolis, the largest privately owned record center in the Upper Midwest. Martha has been active in the records management industry for over 20 years. She served as a board member of PRISM International for several years and is active in the PRISM mentor program. Martha has consistently spoken at PRISM conferences regarding getting started and destruction services for many years. She has been active in the industry, including: Past President of the Twin Cities ARMA

Chapter, active membership in the Minnesota Legal Administrators Association, Twin Cities Archive Roundtable and the Business Continuity Planners Association.

Chris Pearson is President of Vanguard Archives. With facilities in Chicago, St. Charles and Franklin Park, Illinois, Vanguard is a full-service records management company that offers scanning, vaulting, hardcopy storage and shredding services to approximately 600 clients. Prior to joining Vanguard, Chris was a Vice President in mergers & acquisitions with J.P. Morgan & Co., with management responsibility for a group of 30 M&A professionals. During his tenure with J.P. Morgan he resided for several years in each of New York, Hong Kong and London. Chris is a graduate of New York University, where he received a degree in finance and international business management.

Jim Teske is currently President of RecordMax USA, LLC with records centers or affiliates in Alabama, Louisiana, Mississippi and Tennessee. Mr. Teske is a 20 year practitioner in the records and information management profession and is based in Birmingham, Alabama. For the last fifteen years, Jim has held senior management positions with several leading information storage businesses and related technology companies. He has been a member of ARMA International (Association of Records Mgrs. and Administrators) since 1985 and has been affiliated with PRISM International (Professional Records & Information Services Management) since 1989.

John Ulmer has over 25 years experience in the media vault and records storage industry. After selling his three very successful operations located in Knoxville, Nashville, and Chattanooga he worked as a consultant to the industry for the past four years. His specialty is media vault start-ups and selling to IT executives. He has authored several articles on Leadership and Vault Operations, which have appeared in PRISM's InFocus magazine. He was recently tasked by PRISM to prepare a guide for members to write Standard Operating Procedures for their media vault operations. He is currently employed by PRISM as Director of Membership Development.

John Yelland, owner of Yelland Properties, is a pioneer in the self-storage industry. His development experience dates back to 1969 when he constructed the first self-storage facility in Phoenix, Arizona. John developed successful multi-tenant industrial and self-storage facilities as General Partner and General Manager of Linkletter Properties in the seven years from 1972 to 1979. He has been active in the Self Storage Association since 1975, having held the positions of Director and President of Region 2. He was President of the National Self Storage Association in 1988. In September of 1992, Pouch Records Management was established in the Trabuco Self Storage facility with a capacity of 50,000 cubic feet of records storage space. Pouch Records has moved into a new 78,000 sq. ft., 30 foot clear, tilt up building in Fullerton California. Today Pouch serves 470 clients with over 325,000 cubic feet of records in storage.

WORKSHOP REGISTRATION

November 3-4, 2008

Embassy Suites Lake Buena Vista, Orlando Florida

(Please duplicate for each additional registration)

Name (Last) _____ Name (First) _____

Job Title _____ Nickname for Badge _____

Company _____ Address _____

City _____ State/Province _____ Zip/Postal Code _____

Country _____ Phone _____

Fax _____ E-mail Address _____

REGISTRATION FEES

EARLY
(by Sept 29)

REGULAR FEE
(After Sept 29)

PRISM Member Registrant \$499.US

\$549.US

NON-Member Registrant \$699.US

\$749.US

Each Additional Registrant \$399.US

\$449.US

Yes I would like to participate in the optional tour

PAYMENT ENCLOSED

MasterCard Visa American Express

Security code (3 or 4 digits on back of MC & Visa
and on front of American Express) _____

Card Number _____ Exp Date _____

Cardholders Name (please print) _____

Signature _____

*Please note: This credit card will be used for both conference registration
and to guarantee requested housing arrangements.*

**Please fax this form to +1 919-771-0457
or go to www.prismintl.org
and fill out the form online and submit**

NOTE: If paying by check, please make check payable in US funds to PRISM International and mail to 1418 Aversboro Road, Suite 201, Garner, North Carolina 27529 USA. If paying by wire transfer, please call Wendy Gordon at PRISM International +1 (919) 771-0657 for account information.

ROOM PREFERENCES/RATES DEADLINE IS SEPT 29TH

Single/Double \$149.00 US

1 Bed in room 2 Beds in room

Smoking Non Smoking

Roomate _____

Arrival Date _____

Departure Date _____

HOTEL DEPOSITS/PAYMENTS

A one night's deposit as reflected by your choice of accommodations as listed above, along with a 13% local tax is required with this form. American Express, VISA, MasterCard, are accepted.

Special Request (Honored on availability basis only)

For Housing Information Contact:

CMIG - Robin Powers
804-206 Salem Woods Dr. Raleigh, NC 27615
Fax: +1 919-782-5131 Tel: +1 919-782-9417
E-mail: robin@cmig.com

Note: A limited number of hotel rooms are available by special arrangement with the Embassy Suites Lake Buena Vista. Hotel rooms are provided on a first-come first-served basis. Conference attendees are welcome to make their own housing reservations.

Hotel Address:

Embassy Suites Lake Buena Vista
8100 Lake Ave.
Orlando, FL 32836
Tel: +1 407-239-1144 Fax: +1407-239-1718