



Sprint Nextel Takes Control of Their Records and Documents

Communications giant minimizes corporate risks and storage costs with OpenText Records Management solution

Sprint Nextel, headquartered in Overland Park, Kansas, offers a comprehensive range of wireless and wireline communications services, bringing mobility to consumers, businesses, and government users.

With more than 40,000 full-time employees, Sprint served nearly 56 million customers at the end of Q3 2012 and is widely recognized for developing, engineering, and deploying innovative technologies, including the first wireless 4G service from a national carrier in the United States, and offering industry-leading mobile data services; leading prepaid brands, including Virgin Mobile USA®, Boost Mobile™, and Assurance Wireless; instant national and international push-to-talk capabilities; and a global Tier 1 Internet backbone. American Customer Satisfaction Index™ rated Sprint number one among all national carriers in customer satisfaction and most improved, across all 47 industries, during the last four years. Newsweek® ranked Sprint third in its 2012 Green Rankings, listing it as one of the nation's greenest companies, the highest of any telecommunications company.

Uncontrolled documents in central repository

In 2000, Sprint implemented OpenText Content Server as their electronic document management system. Known as “Doc-Share,” the system provides employees with a central repository for storing and sharing electronic documents. To deal with the explosive growth of electronic documents, Sprint added more storage, but this temporary solution was getting more and more expensive. In addition, the system offered no means to enforce retention periods and disposition rules and no way to designate certain documents as records.

A formal records management solution was needed to safeguard Sprint against the risk and cost of content. During eDiscovery exercises, extremely large sections of the repository would have to be collected by the legal department for analysis with no way to narrow the scope via proper retentions and classifications of the information. Instead of sifting through potentially thousands of documents, the legal analysts at Sprint had to sift through millions.

INDUSTRY

Communication

CUSTOMER

Sprint

CHALLENGES


- *Uncontrolled documents*
- *Inability to find records*
- *Exposure to legal risk*
- *High storage costs that continue to multiply*

SOLUTIONS

- *OpenText Content Server*
- *OpenText Records Management*
- *OpenText Classifications*

BENEFITS

- *Improved compliance*
- *Reduced storage costs*
- *Controlled documents and records*
- *Simple classification process for new content*



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SCOTT GRANGER MANAGER, INTRANET PORTALS
AND CONTENT MANAGEMENT, SPRINT NEXTEL

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Scenarios such as these were driving up costs within the enterprise as well as widening the opportunity for legal problems. Sprint needed a way to enforce retention periods and to designate certain documents as records.

Tight integration with OpenText

“In order to make this project a success, we knew we needed a tight integration between our document management and records/classification management tools,” says Scott Granger, Manager, Intranet Portals and Content Management at Sprint. “As a long-time customer of OpenText, and since the records management module was already being used successfully to maintain the inventory of archived company records, it was a perfect match to utilize OpenText Records Management and OpenText Classifications in Doc-Share. The modules were user friendly, could be easily extended to everyone across the enterprise, and would not require a major learning curve or major involvement from the IT help desk. The OpenText solutions were the only viable way to gain control over the number of records in existence as well as those being created on a daily basis.”

Simplifying the records classifications

A diverse team, including representatives from IT, Legal, Records Management, Corporate Communications, and HR, was created to take on this project. “We knew from the beginning that, although the records management and classifications modules were going to be implemented, they could not simply be turned on to solve the problem. There would be a lot of work to do after the tools were installed,” explains Granger.

First, the team organized the almost 300 records classifications in the corporate retention schedule into “big buckets” in order

to simplify identification of electronic records and to improve consistency in lifecycle management. Then, they created 11 records families, which were consolidations of existing records classifications with similar retention requirements and a similar high-level business function. The relationship of the records classifications to the records families is documented within the corporate retention schedule. “This step was imperative in simplifying the classification process for our end users,” says Granger.

Record Series Identifiers (RSIs) were created within the records management system to reflect the rules governing the lifecycle of each records family. This also allowed them the option of adding more granular records classification as a sub-classification, if the end user wants to utilize the more specific records classification title or the retention rules associated with the records classification.

Only four of the records families have a “flat retention” period and use the record date in Doc-Share to calculate retention. The remaining seven have event-based retention rules that use the status date field. Since the fields automatically populate and update, the lifecycle management process is virtually transparent to the end user.

End users from each department have their own type of classifications, and they’re educated on what the retention period is for whichever classification they apply to the record. “They upload their document to a specific folder and don’t even realize that they just classified that document based on that folder’s retention policy. This way, they don’t have to select one every time they upload a document,” explains Granger. Staff are also given a notification when the retention is about to come due in case they want to move it or it’s a work in progress, etc.

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“We have about 120,000 active users, but you could probably interview ten Sprint folks and eight or nine of them would have no idea that they’re classifying content when they upload a document,” says Granger. “It’s that easy.”

Department-specific project managers

When the project officially began in 2009, the Doc-Share repository contained well over 10 million documents, and the team at Sprint faced a very daunting task. “How do you classify millions of documents when the project team is no bigger than 10 people? We knew we could not do it ourselves, so we took advantage of the user-friendly modules and developed an end-user-based approach that allowed folder administrators across the company to help classify the documents,” Granger says.

The team identified their top-level folders and designed communication and training plans for each. Some folders corresponded with major organizations within the company (e.g., Finance, Sales/Marketing, IT). Then the team reached out to the directors of each impacted organization to explain the program and request a project manager for their organization.

“When we started the program, we considered introducing it as a mandate from the IT team. However, we soon changed our approach, realizing that we would get much better results if the message came from the legal team. We had the initial communication come from our chief legal counsel saying, ‘Hey, we’ve got this great new process coming down the pipe. Expect a note from our IT and records management folks. They’re doing this initiative, and this is why they’re doing it,’” explains Granger. “Getting people to understand why we’re doing it instead of IT trying to tell them to do it was much more effective. It carries a bit more weight when the chief legal counsel emails you,” says Granger.

Solid teams and lots of reference material

Sprint reported the biggest lesson learned when implementing the records management system was to create solid, knowledgeable teams at the very beginning before they attempted any classifications. Someone from the records management team conducted all the training classes.

“Make sure you have the tools in a variety of formats to help end users classify their documents consistently and accurately,” says Abby Schmidt, Records Manager at Sprint. “This is imperative when requiring content owners and users to classify their material.”

Some people were very familiar with the OpenText solution and how it works, and others were not. Some people were familiar with records management, and others were not. So the team felt that having those materials and documents in place was definitely a big factor in managing the success of this initiative.

“Abby spent countless hours on this project and was instrumental in making this happen,” states Granger. “We also created several sites where users can get job aids, training links, and other reference material.”

Granger recommends lots of communication: “I think keeping our users informed and explaining to them why they’re doing it was so helpful. Maybe it was just that it was coming from our legal team, but the way they worded it and put some monetary values around it definitely helped carry some extra weight.”

He also recommends having patience; “Allow a lot more time than you’d probably think for an initiative like this because there are so many people you have to engage and so many teams you have to work with that it is kind of slow just getting the wheels going in each organization.”

Strong user adoption

By pointing out the legal exposure and the cost savings, the team at Sprint felt it was an easy sell to the executives. They explained that it wasn’t only because they were going to save approximately \$10,000 in storage costs—it was because they were going to have risk avoidance from an eDiscovery standpoint that could potentially save the company millions and millions of dollars in a lawsuit.

In terms of user adoption, it was very successful. Once the users understood why they were doing it, the adoption was very strong.

Reduction of legal exposure and storage costs

The mission of the project was to reduce legal exposure and associated costs as well as long-term storage cost avoidance by implementing records management and classification practices. With the implementation now complete, Sprint has seen tremendous results. The number of documents classified is over 14 million. They have also been able to reclaim over 1TB of storage space as people cleaned up in addition to classifying content.

The scope of this project was enterprise wide and included all documents ever uploaded to Doc-Share as well as all new documents. The organization has achieved its goal of 100 percent classification rate on documents within Doc-Share.

It was estimated that the legal fees associated with eDiscovery just within Doc-Share exceeded \$1,000,000 per year. After implementing the classifications on all documents within Doc-Share, Sprint’s goal is to reduce those costs by 50 percent. Sprint feels confident that these targets will be met on an annual basis.

Conclusion

“As we continue to navigate through an ever-changing electronic world filled with regulations, legislation, and other business requirements, we are adapting to the paradigm shift from a single records manager for a corporation to a distributed model where the content creator is now aware, able, and required to classify content appropriately because they truly understand the value. The user-friendly solutions from OpenText allow the records management process to integrate seamlessly into the way people work today,” concludes Granger.

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