



Modernizing Municipal Records: County of Newell's \$400K Success Story

A SHINYDOCS MUNICIPAL CASE STUDY



COUNTY OF
NEWELL

 shinydocs

About County of Newell

The County of Newell is a rural municipality in Alberta, Canada serving 7,524 residents across 5,904.67 km². With approximately 80 staff members, they provide diverse programs and services to their community while focusing on sustainable growth and high quality of life.

The County of Newell's records management transformation project showcased how modern technology and Lean methodologies can overcome significant document management challenges, achieving in one year what would have taken 20 years traditionally. This initiative not only delivered substantial returns on investment but also established sustainable processes, improved document accessibility, reduced storage needs, enhanced security compliance, boosted staff productivity, and ultimately improved the quality of service to citizens.

TROUBLES AT A GLANCE

- **86%** of documents were unmanaged across various repositories
- Over **4.1 million** documents were unmanaged vs only **507,654** documents that were
- Staff **lacked necessary capacity** to handle backlog and new documents
- **Inadequate file management training** reported by staff
- **Difficulty locating** and **retrieving** required documents

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Shinydocs has done what years of dedicated service capacity could not, provide records management to County documents across all unmanaged repositories through automation, visibility, and improved search capabilities.

Roberta Fernell, Director of Information & Technology Services at County of Newell

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The Challenge

The County of Newell faced a critical challenge in managing its exponentially growing digital records. Like all municipalities, they had legislative responsibilities under the Alberta Municipal Government Act to ensure all bylaws, minutes, and documents were kept safe. However, their assessment revealed a concerning reality: 86% of documents were unmanaged, scattered across multiple repositories including network drives, SharePoint, OneDrive, Exchange, Teams, and various local drives. With over 4.1 million unmanaged documents compared to just 507,654 managed ones, the situation was becoming untenable.

The impact on operations was significant. Each official record required 1.87 minutes to manage properly, while transitory records needed 0.5 minutes - making the backlog impossible to address with current staffing levels. Email volume alone had grown by 221% between 2021 and 2023, from 202GB to 650GB. Staff reported inadequate training and growing frustration with document retrieval, while the organization faced increasing risks related to compliance, security, and service delivery. Using traditional methods, managing the existing backlog would take an estimated 20 years - an unacceptable timeline for an organization committed to efficient public service.

KEY PRIORITIES



Employee Experience

Make finding information easy and quick for staff



Legislative Compliance

Ensure community and employee access to right information



Storage Optimization

Reduce duplicate and transitory documents



The Solution

Working with Shinydocs, County of Newell implemented a comprehensive solution:

Technologies Used

- Shinydocs for Document Management
- Enterprise Search
- Analytics and Dashboards



Step 1: Focus on Users

Understanding that successful adoption begins with user needs, the County started by engaging directly with staff to map current workflows and pain points.

- Consulted staff to understand needs and current workflows
- Developed training curriculum
- Created pilot program



Step 3: Implementation

The County adopted a user-centric deployment approach that minimized disruption while maximizing adoption.

- Intuitive deployment
- Internal promotion
- Minimal training requirements



Step 2: Data Assessment

To gain visibility into the scope of their document management challenge, the team conducted a comprehensive analysis of all repositories.

- Scanned all repositories
- Tagged and scored documents
- Created comprehensive dashboards



Step 4: Ongoing Management

To ensure sustainable success, the team established automated processes for continuous document management.

- Daily scanning of new content
- Cross-department accessibility
- Maintained security protocols
- Automated report generation

Results



98% of documents now managed



27% storage reduction through duplicate removal



10,002 hours saved annually



\$408,795 cost savings in year one

The implementation of the Records Management Value Stream project delivered transformative results across the organization. By applying Lean 5S methodology to information management, the County achieved fundamental improvements in efficiency, compliance, and service delivery. The project not only addressed the immediate challenge of document backlog but also established sustainable processes for ongoing records management. Key achievements include:

1. **Improved document accessibility across all departments**
2. **Enhanced security and compliance**
3. **Significant reduction in storage costs**
4. **Increased staff productivity**
5. **Better citizen services through faster information access**

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You know that feeling you get when you know that a record exists, but you can't remember whether it was a Teams message, an email, or a formal document? Or maybe you remember writing something, but you can't remember where you saved it? Everyone loves a scavenger hunt, but they aren't as fun when you're trying to find something work related. Shinydocs makes searching across multiple sources a breeze!”

Ariana Nielsen, Executive Assistant at County of Newell

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Looking Forward

Through the implementation of this records management transformation project, the County of Newell demonstrated how modern technology combined with Lean methodologies can solve seemingly insurmountable document management challenges. What would have taken 20 years using traditional methods was accomplished in just one year, while delivering substantial returns on investment.

More importantly, the project established sustainable processes that will serve the County well into the future. Not only did the initiative achieve its primary goals of improving document accessibility and reducing storage needs, but it also enhanced security compliance, staff productivity, and ultimately, the quality of service to citizens.

The County of Newell's success serves as a model for other municipalities facing similar records management challenges, proving that with the right approach and tools, transformative change is possible.

The County continues to optimize their document management processes through:

- Regular system audits
- Ongoing staff training
- Process refinement
- Monthly automated cleanup procedures

RETURN ON INVESTMENT

\$408,795 year one savings.

\$89,946 total project cost (\$69,946 staff, 20,000 technology subscription)

About Shinydocs

Shinydocs automates the process of finding, identifying, and actioning the exponentially growing amount of unstructured data, content, and files stored across your business. Our solutions and experienced team work together to give organizations an enhanced understanding of their content to drive key business decisions, reduce the risk of unmanaged sensitive information, and improve the efficiency of business processes. Our solution works in the background, ensuring no change management or end user disruption.

For more information visit: www.shinydocs.com

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