



BS 10008 certification helps PwC's UK operation transform business efficiency

“BS 10008 has changed what we do and informs the way we operate on a day-to-day basis. Our staff and clients need to be able to rely on the information presented to them, and this standard shows we've done everything we can to ensure it's authentic.”

Sarah Samuels,
Senior Manager - Document Management Team, PwC UK

Customer objectives

- Increase quality of service and operational efficiency
- Enable speedy access to authentic electronic information
- Facilitate remote and mobile working by employees
- Demonstrate excellence, and integrity of information

Customer benefits

- Immediate staff access to authentic electronic records
- Ability to meet client expectations of excellence
- Efficient use of office space
- Reduced risk of security breaches through reduction in paperwork
- Ability to comply with court requests to provide information electronically

Customer background

PricewaterhouseCoopers (PwC) is the largest professional services firm in the world, with a network of firms in 157 countries and close to 184,000 employees. Serving individuals and organizations across the public and private sectors, PwC specializes in assurance, tax, and advisory services. In the UK, it has 34 regional offices, 17,500 staff and almost 900 partners.

Why certification?

As its refurbished Embankment Place offices in London show, PwC prides itself on creating some of the world's best working environments – offices that not only boost employee morale and act as a showcase for clients, but also enable modern ways of working.

Central to this approach has been the company's 30-strong document management team, set up 15 years ago to help deliver a paperless office and enable flexible working. Pioneers back then, PwC continues to be at the forefront of advances in this area, and in January 2012 it became the first company to be certified to BS 10008, a standard that outlines best practice for the management and storage of electronic information.

"It was a natural development," explains senior manager Sarah Samuels. "My team is all about adding quality and operational efficiency. Our business is centred on information and providing advice, so our staff need speedy access to client information, but also the reassurance that the information they are accessing is complete. This extra focus on authenticity made BS 10008 a natural progression from the information security standard ISO/IEC 27001, which we gained in June 2011."

Implementation

Samuels continues, "We already had a good knowledge of standards, and we don't reinvent the wheel every time we apply for a

new one. But at the same time we don't want to end up with a dusty set of procedures that no one ever looks at – it should change the way you operate and inform what you do on a day-to-day basis."

PwC already had many of the necessary policies and procedures in place, but the official quality stamp was important, says Samuels. "Lots of companies say they work to these standards, but don't take the extra step of getting certified. We're the number one consultancy, and it's almost an expectation from our clients that we would do it properly."

Working with an internal consultant who had helped achieve ISO/IEC 27001, the team of four assigned to work on BS 10008 first carried out an internal Gap Analysis, and also had a couple of pre-certification audits. "This was useful as it got the team used to external auditors," says Samuels. "We were already well on the way, from our existing policies and procedures – it was about pulling it all together into a framework, and formalizing it."

Benefits

"The motivating factor for us was operational efficiency," she continues. "I was fairly cynical when we started and wasn't sure how much value it would add. But BS 10008 has become central to what we do – we couldn't operate in any other way."

The extra level of authenticity and integrity that the standard provides enables the paperless office to move to the next level. "When people are working from scanned images, they never see a hard copy. We're working with high-profile clients and with large amounts of money – if a single hard copy page was missing, it could be catastrophic" explains Samuels.

"People need to be able to rely on the information presented to them. When they know that they can, it immediately enables a new way of working. Staff don't have to spend time processing paperwork, and can

work from wherever they want, accessing information on their laptops." From the end of the year, adds Samuels, staff will also be able to access client information from their iPads and smartphones.

For those who are working in an office, it becomes a much more pleasant workspace. "Fifteen years ago there were so many files there was barely room for the people! Now they are completely clean environments and great showcases for clients," remarks Samuels.

There's an added security benefit too, explains Samuels. "The fewer hard copies there are, the lower the risk of a security breach." The company deals with a lot of financially and commercially sensitive data and is often asked to produce information in court – this has also become easier. "The courts are moving towards wanting information provided electronically, and obviously authenticity is vital here. Certification to BS 10008 shows we've done everything we can to ensure that what we're submitting is authentic."

BSI's role

"As we were the first company to go for BS 10008 certification, it was a learning process for us and for BSI, so we worked together in a pilot, over a two-year period," says Samuels. "It was very much a collaborative process, and by the end of it BSI really understood our business drivers. It's very useful to have an external perspective from a professional body that has worked with many businesses across different industry sectors. Being open to constructive feedback is how you move on and improve."

Samuels has no hesitation in recommending BSI, and BS 10008 to other businesses. "The standard can be central to how you operate and enables you to scale up effortlessly, as the methodology underpins everything and the framework to take on new projects will already be in place."