

DocuDriven compares and culls records for vital data migration



CHALLENGE

BBNC required assistance culling records in its Shareholder Customer Relations (SCR) department during the migration from a designated Windows drive to Microsoft Teams/SharePoint. This was a time-sensitive initiative, since SCR was the last remaining department to complete the transition of electronic records to Teams.

The SCR drive contained several files exceeding SharePoint's current storage limit, making it essential to reduce unnecessary or outdated files to free up cloud capacity, eliminate clutter, and ensure only relevant records were migrated. Throughout the transition, it was critical that only accurate, complete, and validated vital records made it into the new system.

SOLUTION

BBNC reached out to DocuDriven for assistance. A comprehensive assessment of all managed files was conducted, including the culling of unnecessary or outdated files and the re-categorization of retained materials.

A multi-step culling system pinpointed pertinent files, miscategorized records, and items requiring further review, all coordinated with BBNC's Records Information Management team, identifying and eliminating unnecessary records while preserving required and historical documents.

To track progress throughout the project, DocuDriven built a Power BI report containing all the channel structures discovered during the initial analysis. This report gave BBNC daily progress updates and an ongoing estimated completion date based on current effort.

"DocuDriven brought clarity and structure to our SCR transition to Microsoft Teams during a critical, time-sensitive phase. Their professionalism and discipline gave us complete confidence in the outcome."

LISA ANDRUS
RECORDS MANAGER,
BBNC



RESULTS

By the end of the project, the volume of files requiring review had nearly doubled from the original proposal, yet DocuDriven maintained the original delivery date. The culling system and daily progress tracking built in from the start meant the added workload could be absorbed without disrupting BBNC's plans for the Teams migration.

The dual approach of eliminating redundancies and unnecessary documentation, paired with an organized channel structure, gives BBNC systems it can rely on for the long term. Records that once lived in a sprawling, inconsistently organized Windows drive are now validated, correctly categorized, and structured in a way that makes sense inside Teams and SharePoint.

With these processes now in place, BBNC is well-positioned to make informed decisions about maintaining orderly, secure, and accessible records that support both its operational goals and compliance needs.

THE DOCUDRIVEN DIFFERENCE

We are built for speed and disciplined execution, especially during high-stakes cloud migrations. By combining Records Management Consulting with a deep Electronic Records Inventory Analysis, we don't just move your files—we make sure they are right. Our teams are structured to handle unexpected surges in workload while still hitting your original deadline. We use Records Management Software to provide total transparency, giving you data-driven confidence that your transition to Teams is accurate, organized, and on budget.

**"I have 100%
trust in
DocuDriven's
ability to help
optimize our
processes and
procedures."**

LISA ANDRUS
RECORDS MANAGER,
BBNC

ABOUT DOCUDRIVEN

DocuDriven optimizes the value of your records, delivering expertly designed solutions — on-time and on-budget. Whether you have decades of paper boxes, large format blueprints, or dormant/unstructured data, we help you cull out what you don't need and make your vital data searchable and easy to find.

When records accuracy, accountability, and scale matter, organizations choose *DocuDriven*.