Going Paperless in 90 Days

A Step-by-Step Guide

Introduction

In the past couple of decades, organizational leadership has focused heavily on efficiency: operating lean and asking their employees to maintain continuity with fewer and fewer resources. But cutting budgets only goes so far. In recent years, managers and workers have refocused on a far more pertinent question: instead of doing the same with less (efficiency), how can we do more with the same (productivity)?

Paper is a serious drag on both efficiency and productivity. A worldwide survey conducted by industry analyst IDC shows that document management challenges account for a 21% loss of organizational productivity. Not that you need numbers to convince you. You see it and feel it every day.

Email, accounting software, ERPs, digital publishing and a hundred other technologies promise to eliminate paper and usher in a golden age of digital perfection. But creating a paperless office eludes many of us. What is the best way to move toward a paperless environment without losing information? And how can you do it quickly?

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Benefits of a paperless office

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Implement a 90-day plan
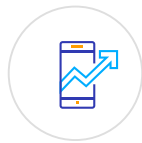
01 Benefits of a paperless office

- Cleaner office
- Streamlined workflows
- Greater agility
- Reduced business risk
- Better customer relationships
- Increased visibility
- Positive environmental impact

Here are some of the reasons why organizations are working to make the paperless office a reality:

Cleaner office

Imagine no more filing cabinets, fewer printing devices, and shelves of storage reclaimed from paper and toner supplies. Less shipping, less photocopying, less filing and searching. The first advantage is a cleaner, brighter, more spacious office.

Streamlined workflows

Automated workflow makes the right content accessible at the touch of a button whenever and wherever you need it. It takes only seconds to route and share documents across multiple departments and systems.

Greater agility

Your competitors are only going to get faster, and the agility that a paperless office gives you is vital to remaining competitive.

Reduced business risk

Custom access controls and digital data security make it easier and less expensive to maintain compliance and reduces the likelihood that missing documents will result in fines or lost revenue.
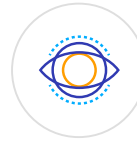
Better customer relationships

Information is only seconds away with a quick search — no more putting people on hold to dig through folders. Deliver the speed and quality of support your customers and vendors deserve.

Increased visibility

Using digital workflows instead of paper results in greater transparency, allowing management to monitor business processes in real time for smarter decision making.

Positive environmental impact

If you have a "green" initiative in place, one of the easiest ways to reduce your carbon footprint is to print, ship and store less paper.

" We've cut our paper usage in half during a period of high growth. With revenues up 26%, handling this growth pattern is no longer a problem, and we've already realized our ROI in just under a year.

Pam Naslund

Office Manager, PEER Bearing

02

3 steps to digitization

If you're planning to go paperless, it is important to have a timeframe for making the leap. Going paperless in 90 days is an achievable goal and provides a rallying cry to get your team on the same page. It also gives you a quarterly target to address and hit while helping to maintain momentum.

Paperless in 90 days

3 steps to digitization

Before you start your 90-day digitization effort, think about the three key steps within your process — capture, workflow, and archiving and retrieval. Each of them benefit from your digitization efforts. When you think about what needs to happen in 90 days to consider the initiative a success, it boils down to setting goals for digitizing three areas:

1 Capture

2 Workflow

3 Archiving and retrieval
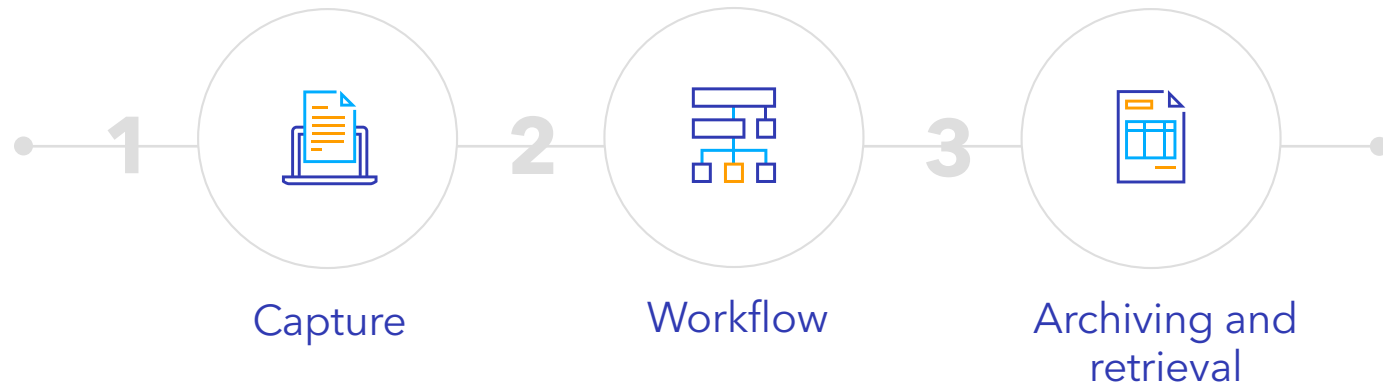
Capture

Information arrives in many ways. Email, faxes, physical mail, web forms and, of course, paper documents are just a few. Each point of entry offers you the opportunity to intelligently capture information so it's findable and usable in future business processes. Even scanning paper and indexing its content can be fully automated.

"Indexing" is the critical step that transforms documents into manageable information by reading key portions of data and storing each data point as an index value. These index values describe the purpose and content of the document and are ultra-efficient for searching and organizing documents.

The indexing process is significantly improved by software that uses machine learning. Machine learning technology remembers the structure of each document as well as your indexing corrections. Every capture increases the speed, accuracy and reliability of the tool. The more machine learning is used, the less time you spend on manual data entry.

Web forms are another tool to simplify, improve and accelerate data collection. Not only are they instantly available to anyone on any device, but forms provide structure to data, so it can be used to automate information flow.

It's also important to be able to capture relevant data that sits in your ERP, CRM or other line-of-business software. It is crucial that your document management software and other systems can speak to one another, retrieving data and populating records to keep business information in sync.

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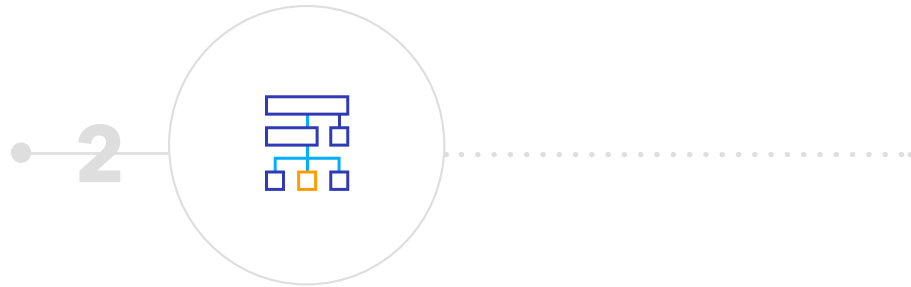
Workflow

The goal is to replace paper shuffling with streamlined digital workflows, with predefined processes for routing, reviewing and approving documents.

Automation enables sharing information with anyone on your team who needs visibility into a workflow process. Every employee responsible for completing a task can view it in the office automation solution. Email updates can be sent to alert employees to new tasks in their work queues. Exceptions and escalations can be configured easily. At a glance, a manager can see what steps are complete and what remains to be done.
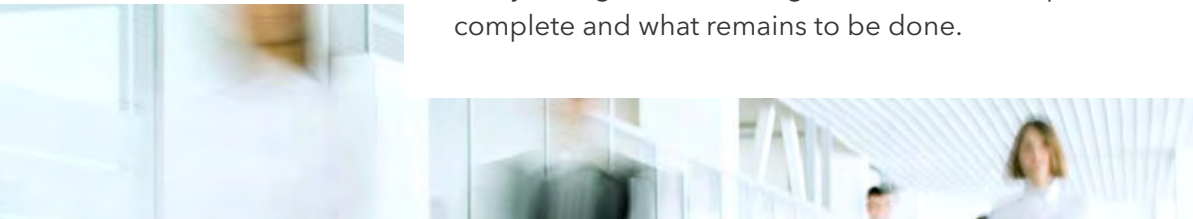
By clearly outlining each process in a "best case scenario" — what it would look like if everything went according to plan — you can start designing more efficient digital workflows in your document management system.

Seek solutions with these useful features:

1. Strong digital workflow software will include a **process-mapping** tool to visualize your processes — a useful mechanism that builds comprehension, consensus, plans and process improvements.

2. The capability to integrate **web forms** into your workflow processes to further eliminate the use of paper can be a massive user experience upgrade and a much faster path to overall digitization.

3. **Mobile** capabilities allow you to capture, route and approve documents on the go. Keep telecommuters and staff in remote locations in the loop to make sure they don't miss deadlines.

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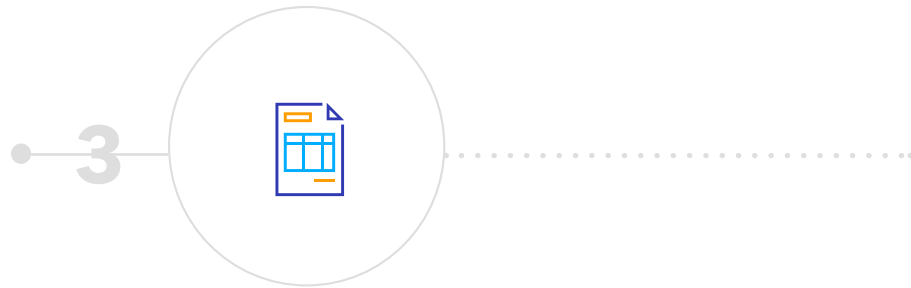
Archiving and retrieval

After information is routed via automated workflow, it should be archived in a way that is fast for easy retrieval along with controlled access. If you've followed best practices for indexing data at the capture stage, your digital documents will be clearly organized, easily findable and ultimately usable by the business.

Security is a big concern in archiving documents. Not only does strong security and backup measures ensure information recovery in the case of a disaster, but it keeps unwanted readers out and helps meet critical compliance regulations like HIPAA and GDPR.

"Thanks to our document management solution, we are saving a lot of the time normally spent on searching and storing documents. This has meant recapturing a good 85 hours monthly for our organization, which basically means the work of one part-time employee. This means that we were able to reach our aggressive growth goals with our existing resources.

Ralph Farrow, IT Manager,
Smithfield Food, Ltd.

3 steps to digitization

03

Implement a 90-day plan

First get input from your leadership team and from end users. Then take the time to fully delve into paper-dependent processes. You need to understand the source of the pain before you can administer a cure.

The 90-day plan

FIRST
30 days

1. Develop your team
2. Analyze processes

NEXT
30 days

3. Design the solution
4. Create awareness

LAST
30 days

5. Deploy your solution
6. Training
7. Go live

FIRST

30 days

1. Develop your team
2. Analyze processes

Step 1: Develop the leadership team

The most fundamental requirement for a successful initiative is getting buy-in from your organization's leadership team. Your stakeholders should have the power to push the paperless agenda.
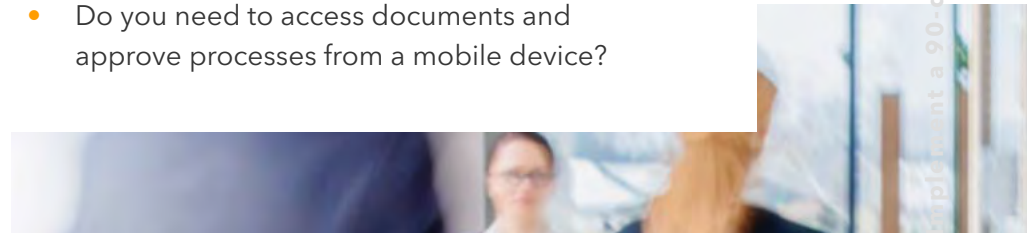
Don't minimize the importance of getting input from end users who often understand more about the day-to-day work than their managers do. You may want to bring in an external office automation professional as part of the leadership team — either a third-party office automation vendor or consultant — to guide the conversation about what is feasible in the short- and long-term.

Step 2: Dig into your business processes

The discovery process is essential and requires thoughtful process mapping. Identify key steps, bottlenecks and frustrations by asking your colleagues for input.

When you walk through the lifecycle of a specific document or process, ask these questions:

- What **initiates** the process — an email, a phone call, an electronic form, a paper form, a letter that comes in the mail, or a walk-in?

- How do you **capture** the information?

- What's the first action you take with that information?

- Where is the information **stored**?

- Who's involved in the process? Does the document require review or approval?

- When is integration with another system or an ERP necessary?

- Do you need to access documents and approve processes from a mobile device?

NEXT
30 days

3. Design the solution
4. Create awareness

Step 3: Design the solution

Once your team has good visibility into your business processes, it's time to design a paperless solution that addresses the concerns of the leadership team. This design phase determines what software components and features should be used in creating your paperless office.

Decide whether you want to implement a cloud or on-premises solution. Your decision will be based on many factors including the structure of your organization's IT infrastructure, the potential cost of upgrading your hardware, and the bandwidth and expertise of your IT team.

If you've followed the previous three steps and engaged end users in the process, the design phase is when they start asking, "How soon can we install it?" They see the vision, and they want to see its results.

The primary benefits of cloud computing

Small Organizations	Mid-sized Organizations	Large Organizations
Fast implementation with low cost of services	Modernization of legacy IT environments	Modernization of legacy IT environments
Low initial cost	Easy scalability for growth	Highest security and data redundancy
Independence for business units	Ability to add new capabilities or features	Elimination of software licensing and upgrade fees

Step 4: Create awareness and communicate the plan

You've designed the solution. Next, you need to ensure that the team's vision for the paperless office is shared with department managers and end users. Creating this awareness is key to effective change management. Even those who hesitate or resist moving away from familiar, paper-based processes will come around.

One good way to spread the word is by sharing videos that give a high-level view of the solution. The goal isn't to sell users on the technology features, but to create awareness of how office automation takes the drudgery out of daily tasks and helps employees to achieve job-related business goals. Demonstrate progress in regular review meetings. Then schedule a launch party to celebrate your accomplishments.

"Our paperless court is one of our most exciting new uses of DocuWare. Initially, some of our judges were a little concerned about moving toward a paperless environment, but our pilot program is quickly changing minds.

Lance Bunnell, CFO
Tippecanoe County

03

LAST
30 days

5. Deploy your solution
6. Training
7. Go live

Step 5: Deploying your office automation solution

Depending on the design, deploying your office automation solution might begin with the creation of a test system or occur in several phases. Test early and often. Testing is often glossed over, but it's a great way to avoid surprises during the implementation that could cause business disruptions later.

Resolve outstanding issues and demonstrate progress in regular review meetings. This is also the time to begin training IT administrators and power users.

Once the system has been deployed, run through one of your processes with sample documents or files, and use this as a training exercise.

Step 6: Training

Training time can vary from a few hours for the end users who are assigned to a small number of workflows to one or two days for system administrators and power users.

Don't forget to create ongoing technical documentation. The paperless office is an evolving ecosystem, not something you set up and never think about again. Include discovery findings and design choices as well as system configuration settings. Your documentation should also identify who the system administrators are so that everyone knows whom to contact internally when questions arise.

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As each department came onboard, we discovered we were building a DocuWare user group that was willing and able to assist as more departments came online.

Ray Hoyt, Title III Project Director,
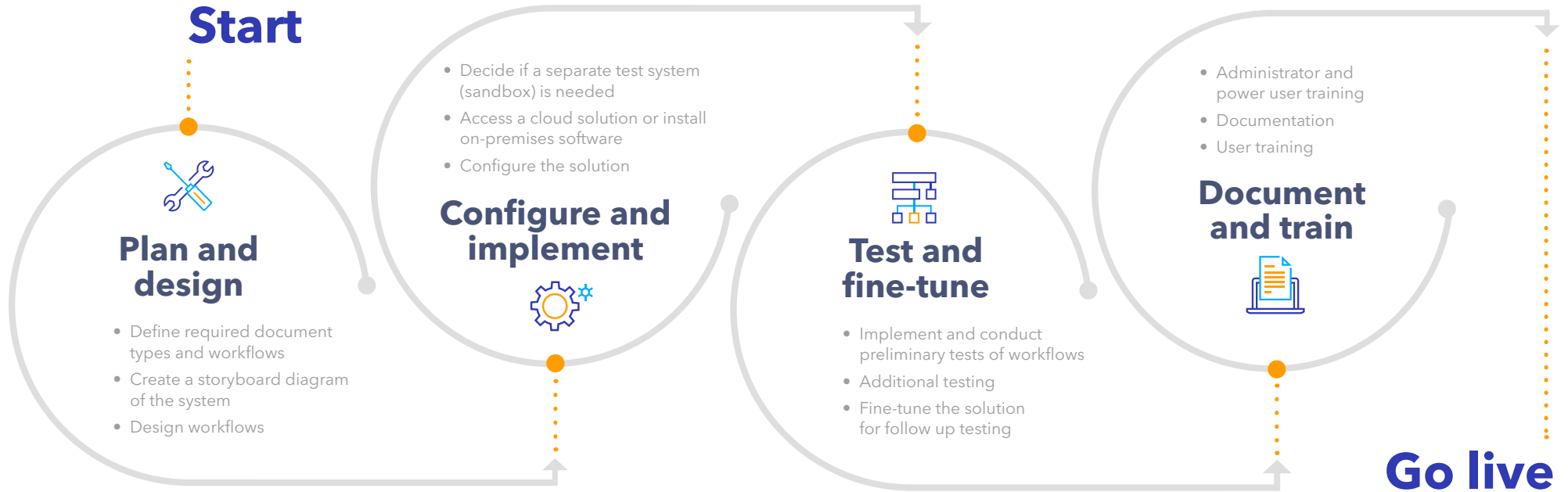Tillamook Bay Community College

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Training best practices

- **Educate power users and administrators first.** They are an in-house resource for other users. They can also take part in training the rest of the staff.

- **Offer hands-on training.** Users learn by doing. Show them how their specific tasks are done. Then give them time to practice at their workstations.

- **Have an IT administrator or a power user sit in on the training sessions.** They can help users who need extra attention.

- **Do not try to teach everything in one session.** Training sessions should be shorter rather than longer and cover one topic at time.

- **Create a cheat sheet or video broken down by task.** These tools reinforce product knowledge.

- **Record webinars and document in-person training.** In addition to providing training for new employees, recordings enable current employees to review course content as needed.

- **Use the resources provided on the software company's website.** Encourage your staff to join user forums and consult online FAQs.

Paperless in 90 days

Your roadmap

Start

Plan and design

- Define required document types and workflows
- Create a storyboard diagram of the system
- Design workflows

Configure and implement

- Decide if a separate test system (sandbox) is needed
- Access a cloud solution or install on-premises software
- Configure the solution

Test and fine-tune

- Implement and conduct preliminary tests of workflows
- Additional testing
- Fine-tune the solution for follow up testing

Document and train

- Administrator and power user training
- Documentation
- User training

Go live

Plan your next move

If you're ready to take the next step toward becoming a paperless office, partnering with the right vendor is essential to achieving maximum ROI. DocuWare has developed a highly efficient process to to transform your business and improve document handling, workflow and employee collaboration.

Click below and a RICOH sales representative will contact you to schedule a meeting.

Contact Me