



White Paper: 5 Tips for Going Paperless

Introduction

In June, 1975, Newsweek Magazine published an article called “The Office of the Future.” It was touted as an “in-depth analysis of how word processing will reshape the corporate office.” In the article, Vincent E. Giuliano of Arthur D. Little, Inc. was quoted as saying that “1990, most record-handling will be electronic.”

So, where does business begin on their quest to the paperless state? Can there really be a completely paperless office? Or is the truth of “paperless” somewhere between row upon row of paper-crammed file cabinets and the sleek concept of the “office of the future?”

This White Paper can help you decide just where and how you should head in your quest for “paperless.”



Tip #1 – Decide what you *really* want to accomplish.

“I want my office to be paperless,” in and of itself, is actually an ambiguous goal. So, consider what *results* you hope to attain with your paperless office – for instance:

- do you need more efficiency, so you can do more with less;
- do you require additional security measures for your internal documents;
- do you want to save time when you need to find a particular document;
- do you want to reduce space requirements and storage costs for old documents
- do you need to confirm to new regulations?

These are just a few of the results that businesses hope to achieve when they go paperless. Your office may have other goals in mind. The important thing is to know what you want to achieve. Determining what results you want can help you determine what existing paper documents need to be converted, the order in which they should be converted, what software or SaaS solution you need to track your electronic documents, how they should be indexed or OCR'd for your system, what portion of your staff will be immediately affected, and other details that will influence the success of your conversion project.

An experienced provider of paperless office solutions and technology can be an invaluable guide in helping you sort through the best paperless direction for your business.

Tip #2 – Get Buy-In from Your Staff

No matter how well-conceived your ideas are, you need a co-operative staff to help implement them. It is a fact that most office cultures *do not like change, even* when the change is for the best. So, how do you get the buy-in you need?

Every change process starts with a change in the mind-set. You can begin to motivate a

change in employee mind-set by getting them involved in the change early in the process.

Start talking about it early and often. Ask their opinions. See if they can suggest ways that their job workflow could be easier, better, faster. Engage them in the process from the beginning. These people “in the trenches” may have ideas for better processes that you never even thought of...after all, they’re the ones moving the paper from place to place all day long.

Once they engage, and accept the change as necessary and know how it will benefit them, then the time is right to initiate the change process. The first and most fundamental step toward effective adoption of a paperless office is a motivated, enthusiastic and positively inclined office staff.

Tip #3 – Plan the Transition

Prior planning prevents paperless process pain! Before buying hardware and software, it is essential to understand your processes as they currently exist. Now is the time to revamp processes, improve workflows and thoroughly plan your transition.

It’s generally recommended to do your paperless transition in stages. For some businesses, this means going department by department. For other organizations, it may be best to start with current clients or customers and update their files as they seek your services. Other businesses may be eager to disengage from all their paper archives in order to free up needed space.

Whatever is the right way for your organization to move toward the paperless office, make sure you have a plan with a realistic time frame and checkpoints along the way to make sure you’re

on track. Remember even the most well-thought-out plan may need some adjustments as you put it into play. That’s why it’s important to have frequent checks on progress.

Of course, part of your transition to paperless is ensuring that you purchase the most appropriate types of hardware and software for your intended use. Manufacturers and technology resellers can be valuable sources of information, as can other businesses that have already made the leap to the paperless office.



Tip #4 – Rely on Document Conversion Experts

This may be the most important tip of all! One of the biggest components of converting to a paperless office is the actual conversion of existing paper. It’s a large job that businesses are often tempted to do in-house in order to save money.

While scanning a few documents in-house is an easy task, scanning boxes of archives can be as much of an “art” as it is a science. And, anyone who doesn’t scan documents regularly doesn’t know the many “tricks” that form the art that provides clear digital documents -- properly formatted, indexed and OCR’d for your document management system. Your archived documents are your business’s assets and should be treated with care. Established firms who provide document conversion and

document management services are far better equipped to do the scanning job quickly, accurately and reliably. Most also offer destruction services in order to safely and securely dispose of the paper once it's scanned.

Most organizations find that outsourcing their document conversion provides far better ROI than doing it in-house. In addition, by outsourcing your document conversion, you enable your internal staff to continue to focus on your core business, even during your firm's move toward the paperless office.

Tip #5 – Have Realistic Expectations

You're still going to have paper to deal with. Even if you scan all received documents into your system and create and manage all of your in-house documents digitally; eliminate paper faxes by sending and receiving digital faxes; electronically sign outgoing documents, you're still going to have paper moving through your office. For instance, some of your clients and customers will still want paper invoices. Some vendors will still want hand-signed hard copies of contracts.

You must be scrupulous about back-ups. If you're using a SaaS/Cloud document

management system, back-ups, redundancy and disaster recovery are probably part of the package, but you need to know exactly how your documents are being protected, and should get a guarantee in writing from the provider. If you're hosting your own document management system, then you must ensure that your system and your documents are backed up, stored off-site and readily accessible in case of emergency.

Conclusion

The most obvious initial impact of moving to a paperless office is the cost reduction associated with printing, mailing, shipping, and storing paper. However, as you and your staff become more comfortable in the paperless environment, other benefits should become apparent:

- Less time spent looking for lost documents
- Fewer hours sorting and filing invoices, letters, contracts and copies of client documents
- The ability to access all sorts of information via computer, even from remote locations
- Increase document security

About Paper Alternative

The experts at Paper Alternative have extensive experience in the document conversion and workflow industry and services primarily U.S. East locations from their NY headquarters. They have operation facilities in central New York as well as affiliate on-site operations. Using the latest imaging equipment and document management production software Paper Alternative ensures high quality scanned images and accurate data for large and small businesses, government agencies, financial institutions and legal firms. [Contact Paper Alternative](#) for help with all your document management and document conversion needs.