Become A Paperless Company In Less Than 90 Days

www.docuware.com

Organizations around the world feel the pressure to accomplish more and more with fewer resources. For many employees, it's a struggle to stay on top of daily workflows because they're inundated with information and hampered by inefficient, paper-based business processes.

Becoming a paperless office makes working more fluid and productive by transforming manual processes and automating repetitive tasks. And recent technology advances have made going paperless both easier and essential.

When properly implemented and configured, paperless office software helps people to quickly access the content they need, complete tasks quickly and then archive the file securely. It frees them from tedious, time-consuming tasks and the frustrations of not being able to find information.

At this point, it's likely that many of your customers and supply-side partners already have electronic processes in place. This means that going paperless has a greater impact on your larger business ecosystem than ever before. Not only are you digitizing your own internal paper-based processes, but it also allows you to extend your digital workflows to these external organizations.

When you're interacting in an entirely electronic environment, processing invoices, purchase orders and even service orders happens faster and with greater accuracy. For example, if a supplier submits information to you electronically, your paperless office software is able to automatically capture data from those files and forms, eliminating redundant data entry. This allows your employees to focus on reviewing data instead of keying it in.

Going paperless has a greater impact on your larger business ecosystem than ever before.

The benefits of going paperless are numerous. Here are just a handful of reasons why more organizations are working to make the paperless office a reality:

1. **Streamlined workflows:** When the right content is accessible at the touch of a button, it takes only seconds to route and share documents to any number of people across multiple departments and systems. This ease of access greatly improves efficiency in a variety of contexts, such as approval processes.
2. **Greater agility:** Your competitors are only going to get faster, and the agility that a paperless office gives you is vital to remaining competitive.
3. **Reduced business risks:** A fully digital environment allows you to work not only faster, but also safer. Access controls and data security make it easier and less expensive to maintain compliance, and reduces the chance of missing documents that could result in lost revenue. Compared to a paper-based system, enterprise content management (ECM) makes it easier to protect business secrets and confidential information, such as contract details as well as employee and patient data.
4. **Improved collections:** Accounting departments benefit greatly from going paperless, especially when it comes to collections. A big challenge for collections departments is that it's often difficult to access the necessary documents while on the phone with a customer. With an ECM system, critical business documents are easily retrievable, which tends to shorten the collections cycle and improve cash flow.
5. **Increased visibility:** Using digital workflows instead of paper results in greater transparency, allowing management to monitor business processes in real time. This makes it easier to keep tasks on track and to identify problems and opportunities for improvement.

Could You Become A Paperless Office In Less Than 90 Days?

If you're planning to go paperless, it's important to have a timeframe for making the leap. "Paperless in 90 days" is a great achievable goal for many organizations and provides a rallying cry to get your team on the same page.

Setting a goal of achieving the paperless office in less than 90 days also gives you a quarterly target to address and hit while helping to maintain momentum. And the sooner you reach that deadline, the sooner you start enjoying the benefits of going paperless.

When you think about what would need to happen in 90 days to consider the initiative a success, it boils down to setting goals for digitizing three areas:

1. **Capturing information:** Documents come into an organization in several ways, such as email, faxes, mail and forms. Each of these points of entry must be digitized. As faxes and paper mail go by the wayside, there's less of a burden in terms of scanning, but capturing email is increasingly important.

   Creating a "smart inbox" allows people to quickly feed emails into the right channels of your system, whether that's archiving it in your central document repository or using it to launch a business process. This ensures that the email is captured in a way that moves tasks forward, instead of piling up in individual email accounts.

2. **Routing information:** Once information enters your paperless office, it needs to be routed through the organization. Here, the goal is to replace paper shuffling with streamlined digital workflows, with predefined processes for routing, reviewing and approving documents.

3. **Retrieving information:** After the information has been routed, it needs to be archived in a way that allows for easy retrieval and managing access. You want to be sure your digital documents are captured, tagged and named correctly, so that they're easy to find with a search.

As an example, let's look at how this digitizing process would work in an accounting department. If your accounts payable (AP) process is largely paper-based, there may be several options for capturing invoices in electronic form.

First, you could ask your vendors and suppliers if they're able to send you electronic invoices instead of paper. Whether you're receiving electronic invoices or scanning in paper documents, intelligent indexing or intelligent capture tools are able to automatically read files and extract the essential information, such as the customer name, invoice number, amounts, etc.

Once that information has been captured, the ECM system could then use digital workflows to automatically route them to the appropriate queues for processing. This makes sure an invoice is routed to the right people for review in a predefined approval process. The final step is archiving the digital documents and accompanying data in the ECM's central document repository, already indexed for easy retrieval later.

That's just one example of what would need to happen to bring a department into a paperless environment in 90 days. The big win in this example is that you significantly reduce invoice processing time. Since the system is able to extract much of the important data, employees don't need to spend a lot of time manually keying data into the index fields. And instead of having multiple copies of a document floating around, you have a single, authoritative record, stored in a way that facilitates anytime, anywhere access, which reduces the effort people must spend to manage files. With a paperless ECM solution in place, you capture it once, process it once and store it once.

To achieve this 90-day goal, you need the right paperless office software and hardware. Equally important, you need to break that goal into six smaller steps that follow a strategic process.

6 Steps To Creating Your Paperless Office

Here are the key stages in creating a paperless office in less than 90 days. While it may be tempting to push ahead and take shortcuts to hit that 90-day deadline, each of these stages plays an essential role in creating a successful paperless solution.

Step 1: Developing The Leadership Team

The most fundamental requirement for a successful initiative is getting buy-in from directors and C-level executives. Getting that buy-in helps to set the direction and goals for the project and push it forward. That's why the first stage in going paperless is to create an internal ECM team.

This team should include the aforementioned leaders, representative stakeholders and internal experts who are able to offer feedback from each department about the challenges and opportunities they face in going paperless. You may also want to bring an external ECM professional into the leadership team — either a third-party consultant or ECM vendor — to guide the conversation about what's feasible.

The goal is to ensure that each department has a voice in the initiative and understands the objectives and what's feasible. When selecting stakeholders, choose a representative group of people who are able to explain and disseminate this vision to the rest of the organization. The stakeholders should also be high enough in the organization that they're able to push the leadership team's agenda, whether that's to improve cash flow or increase visibility into how long it takes to process files.

> To build a paperless office in less than 90 days, you need the right technology and a strategic, six-step process.

Without such a leadership team, the initiative is likely to fizzle due to lack of support, or get stuck in conflicting agendas.

It's important to choose this team carefully: You need different departments to work together toward a paperless strategy, and directors often have their own ideas, interests and problems. A common mistake is for one department to resist changing the way it does business while expecting other departments to accommodate them by changing their methods.

When these situations arise, having an executive on the team keeps the overarching goal in sight and helps departments to work out their differences as you roll out the system. Take a team approach, and focus on helping everyone improve by going paperless.

Step 2: Creating Awareness

Once you've created a leadership team, you need to ensure that the team's vision for the paperless office is being shared with the end users. Creating this awareness is key to effective change management.

Inevitably, some users are going to hesitate or resist moving away from familiar, paper-based processes. But when they see that the initiative has strong support at the executive level and understand what it's trying to achieve, it reduces the tendency to keep doing things the old way, and helps to connect users to the overall mission.

The last thing you want is for users to feel they've been forced into a business process change without having any input in designing the system. Too often, an ECM leadership team focuses exclusively on the high-level benefits for the organization and specific departments, such as accounting or human resources, but fails to communicate the benefits to individual end users.

> Without an ECM leadership team, a paperless initiative is likely to fizzle due to lack of support.

End users tend to focus on their jobs and daily tasks, rather than company-wide strategy, so they judge the value of the paperless office based on how they think it's going to affect their job. If they don't see a clear benefit, they tend to drag their feet when it's time to roll out the ECM solution, and that hurts user adoption.

Creating awareness of the initiative's high-level goals early on helps to head off objections, because it gives users time to get comfortable with the idea and develop a better understanding of how it's likely to impact their day-to-day tasks.

One good way to spread the word is by sharing YouTube videos or documentation that gives a high-level view of the solution. It's best to build a content library focused on the benefits of the paperless office. The goal isn't to sell users on the technology features, but to create awareness of how ECM improves specific areas of your business.

By creating awareness early on, users are familiar with the concepts and goals by the time you're rolling out the solution, rather than having something brand new forced on them. The benefits of this stage may not be apparent until later on in the process, but having everyone moving toward the same goal of "paperless in 90 days" is a key factor in a successful initiative.

Step 3: Digging Into Your Business Processes

If you don't have a clear understanding of your business processes and what's needed when moving them into a digital environment, you're likely to head down the wrong path and end up with a system that fails to meet your goals. Missing a key step could result in lost revenue and carrying your current inefficiencies into the paperless office.

Taking the time to dig into those processes ensures that your ECM leadership team has a holistic understanding and good visibility into your current bottlenecks. Your end users know where these bottlenecks are, but executives may not, so this "discovery" process is essential.

The goal here is to go through each process, identifying the key steps and users' frustrations with the current system. Documenting these issues allows you to address them later in the design step, and gives end users a voice in the process.

As you follow the paper trail, you'll find a lot of the bottlenecks. Start by walking through the life cycle of a specific document or process, and asking questions:

- What initiates the process — an email, a phone call, a walk-in?
- Who's involved in the process?
- How do you capture the information?
- Where do you route that document or data?
- Who needs to be notified?
- Where is it archived?
- How do you retrieve it later?

As you go through these questions, users may help you identify problems, such as, "I wish it could do this," or "It's wasteful that we have to do this." Resolving those user concerns as you create digital workflows helps to improve efficiency as well as job satisfaction.

Step 4: Designing The Solution

Once your team has good visibility into your business processes, it's time to work with an ECM expert (such as a consultant or vendor) to design a paperless solution that addresses the bottlenecks and other inefficiencies. Key considerations include how to link files together, where to share information and what index fields to build into the system. These then determine what components and features should be used in creating your paperless office.

The main goal for the design phase is to combine your knowledge of your business needs with the expertise of your ECM consultant or vendor, making sure you share a common vision and that the vendor's solution is going to work for you. If the solution isn't what you envisioned in some way, there's time to rethink and reconfigure various aspects until it's right.

One benefit of the design step is that it allows end users to see what the solution is going to look like and helps them visualize how the change could benefit them, which tends to generate additional excitement about moving to the paperless office.

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've had input in the discovery phase, and the design shows them how their pains are going to be addressed. They see the vision, and they want it.

That enthusiasm doesn't just come from end users; department heads also get excited when they see how the paperless office is going to free up the team's time for higher-level tasks that they just don't have time to tackle with the old system.

Step 5: Deploying Your ECM Solution

Depending on the design, deploying your ECM solution might begin with a test system or occur in several phases. This is also an important time to begin training. Have your IT admins shadow the vendor or consultant while they're installing the system on your servers or in the cloud.

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

> Resolving user concerns with digital workflows helps to improve efficiency as well as job satisfaction.

Deployment brings all of the earlier planning stages to fruition. If you've followed the process, you're ready to begin applying the right technology to the right business practices, becoming a paperless office.

Step 6: Documenting Your Paperless Office

Think of your paperless office as a growing, evolving ecosystem, not something you just set up and never think about again. As your company grows, you're going to want to extend the paperless office into new areas and new processes. The goal is to prepare your company to support the system going forward.

That's why it's essential to document the solution you've put in place, including the findings of your discovery and design phases and the system's configuration settings. Your documentation should also identify the admin users, so that people know whom to contact internally when questions arise.

What you don't want to have happen is for someone to take over an ECM leadership role from someone else and not understand what the system is doing. Sometimes, when an ECM system has been in place for many years, people may know that it's still running in the back office, but have no idea what the benefits are or how to use it. When there's no visibility into the system and nobody knows what it's supposed to be doing, that capital investment goes to waste.

Documenting your paperless office systems helps ensure consistency, which has long-term benefits for end users and the organization. It also helps the vendor support team to see what was installed and in place, making it easier to address any problems or upgrade the system.

Measuring The Impact Of The Paperless Office

While individual circumstances are always a factor, following these six steps should allow an organization to achieve the goal of a paperless office in less than 90 days. But now that you're paperless, how do you measure the success of the initiative?

On a high level, have you achieved your goals and fulfilled the mission of going paperless in fewer than 90 days? On a day-to-day level, has the paperless office improved your employees' work life and job satisfaction?

To assess the system installation and setup, start by looking at how well you've digitized those three areas discussed at the outset: capturing, routing and retrieving information.

1. **Capturing information:** Are you able to quickly capture all of your documents in your ECM system? Have you reduced the number of redundant copies? If you're capturing information effectively, you shouldn't see people printing out copies for their own records to track it themselves.
2. **Routing information:** Are you able to process documents quickly in a digital workflow? One way to measure this is by how long it takes to process approvals. If it used to take five days and now it takes one day or less, that's a big improvement.

Documenting your paperless office systems helps ensure consistency, with long-term benefits for end users and the organization.

3. **Retrieving information:** How quickly and easily are employees able to find the files stored in your system? A good gauge of success in this regard is how confident your end users are that they could go back and retrieve a document when they need it.

In the end, the main reason for most companies to go paperless is to improve efficiency, so that you're able to take on more business with the same number of employees. Doing before and after comparisons of your essential business processes should give you a good understanding of everything you've achieved by going paperless.

About DocuWare

DocuWare is one of the world's leading document management software companies. Its products are available in 70 countries and 16 languages, with over 125,000 users in approximately 14,000 installations. The company, founded in 1988, operates worldwide from Germering near Munich, Germany, New Windsor, New York, and Wallingford, Connecticut, with subsidiaries in the U.K., Spain and France.

For more information on DocuWare, visit www.docuware.com.