

PAPERLESS OFFICE STRATEGIES

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Does less paper mean paperless?

**By Alita Marlowe Bluford
and afterword by Todd McIndoo**



Does less paper mean paperless?

The right answer is Yes...and... No. This is a question that business owners have pondered for several years. Since the concept of 'paperless' was introduced in the late 1970's, it has been reported by paper manufacturers that actual paper consumption in the United States has increased by 80%. In fact, the invention of email has increased paper in offices by 40%. Why?

In my consulting work with small to medium sized businesses, I often hear the following: "We are trying to go paperless" or "We have been trying to go paperless for a while but can't seem to get there." When I ask them what does 'paperless' mean to them, I receive a variety of answers some of which I've included here.

- We have switched from pegboard accounting to using accounting software.
- We now send our invoices/claims electronically.
- We send electronic greeting cards to our clients/patients.
- We use email exclusively for interoffice communication.
- We use electronic scheduling software.

Each of these statements represents intent and an action step towards reducing paper in the business environment. Some businesses have embraced the paperless concept and are farther along on their journey to a paperless office environment. Others have implemented one or two of the systems mentioned above and are a little more cautious and hesitant. To each his own. A few things however are required to successfully move towards reducing paper in your business environment.

First:

Make the transition in your workplace a 'one step at a time process. Pick one area, one function, one process, one system and begin there. Don't try to eliminate paper completely in one fell swoop. That type of abrupt change would be devastating for your business. Realize that you need a **two pronged approach** to the process. A: dealing with **current documents** that need to become digital and B: Planning for **future documents** to be created digitally; eliminating the need to transfer them to electronic format via scanning.

Second:

Seek advice from experienced consultants who can provide an objective analysis of your work flow, systems and processes. They most likely will discover inefficient and sometimes ineffective systems. Your workflow processes will become much more efficient when your paper documents are digitized. However, you are probably too close to the process to be a good resource to recommend appropriate changes. Don't try to be all things to all people. Focus on keeping your business revenues up and invest in an expert to analyze your processes and help you develop goals and a realistic project plan that is within your budget and that ensures the project will not get bogged down and fail half way through the process. It is well worth the investment in a consultant.

Third:

Do your homework and research technology products that are a good fit for your needs: both now and in the future. Again, look at the two pronged approach. A. changing current paper documents to electronic form (as in scanning) and B. creating documents initially in electronic format.

Fourth:

For the **document transfer process**, be sure that your team is trained by the technology vendor or an expert who is knowledgeable about both your business processes and the capability of the scanning software. Investing in scanning software that is easy to use, quick to learn and user friendly (intuitive) is high on the priority list of 'must haves'. A quick multifunction scanner is also a must. Just getting the right hardware is not the complete answer and vice versa, you need both. If either the hardware or the software is difficult to use, your team will resist and your paperless goal will be a failure.

For the document creation process, be sure that you have done a thorough analysis of the efficiencies and inefficiencies within your current system. Remember the goal is to increase efficiencies and if your solution has more steps and hoops to jump through than the original process, your team will rebel. Again, a step by step approach is best. One system at a time.

Wherever you are in your paper reduction process; if you are almost paperless or just on the edge of using less paper, several facts are relevant to this journey.

1. Mailing a paper document costs at least .43 cents. Emailing a digital document is free. No matter how large the file is. Still free.
2. Scanning your documents into PDF's allow for a common, universal approach to document indexing, storage and retrieval. There are over 800,000 users of Adobe Reader.
3. Paper documents are vulnerable to natural disasters such as fire, and flooding. One never knows when that might occur in your business. (That is precisely why it is called 'accidental'). Digital documents, on the other hand, can be kept securely, safe from fire or flood. They can be easily placed in multiple locations, backed up to external hard drives or websites.
4. Digital documents if handled correctly are more secure than paper documents. After HIPPA was passed, many healthcare providers were required to purchase file cabinets with locks so people with after hours access to your building couldn't access patient files. If your business is in the medical, legal, banking, financial, accounting field, you can feel comfortable that your documents can be password protected and accessed only by the right people at the right time. The cost of a password: zero. The cost of a locked filing cabinet: significantly greater than zero.
5. U.S. paper producers consume approximately one billion trees every year. This is about 735 pounds of paper annually for every American office worker. Why not help our generation and the next; and save a tree?

Afterword:

Look at all this great advice, excellent job Alita you really condensed some very tough concepts into a simple to read article. Your quote here is perfect "Make the transition in your workplace a 'one step at a time process. Pick one area, one function, one process, one system and begin there. Don't try to eliminate paper completely in one fell swoop." I have worked with numerous businesses, groups and governments over the past five years and one thing I have really learned is to temper the approach towards the "paperless goal". A scanner can scan as many documents as you put through it, Speedy Organizer software has been tested to 2,000,000 documents, and technology is not the issue. Is your organization ready for all of this work and all of these changes to your current business processes? The short answer is no. Take your time and do it only if it provides a more efficient process and saves your company money, do it one step at a time!

About the authors:

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