

What You Need to Know About Going Paperless

4 Things to Consider as You Plan to Go Paperless

This article discusses the 4 things that you need to know before embarking on a mission to go paperless.





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This Just In

2014 may be the year that we all really “go paperless”. I believe that we now have all of the technology required to replace paper with its electronic equivalent – including tablet computers which finally solve the “consumption” problem of how to easily read and edit documents in the cab, plane, or on the way home on the train.

A 2012 “AIIM Market Intelligence Report” survey (www.aiim.org) confirms that paper records are decreasing in more organizations than increasing. This was the *first* year that AIIM saw this trend in their survey. And why wouldn’t you go paperless? The benefits are significant and include:

- Recovering valuable office space
- Reducing off-site storage costs
- Better client quality-of-service
- Better discovery of content and re-use of content
- Better access to content for clients and employees
- Better security of content
- Better records management
- Better workflows to drive operating efficiencies

So Lets Get Started

Not so fast! Before you start to **plan your project**, there are a few things you should know – or may already know – but may need to be reminded of.

Going
Paperless



It's a Process



1 - Going Paperless – It's a Process

Just in case you were thinking about the “cut-over on Labor Day weekend” method of implementation, consider that going paperless is a *process or more precisely, a series of processes*.

Start by identifying all of the processes in the firm which involve paper (new client intake, prebilling, client correspondence, document review) and rank them as to value and ease of transition to paperless. Then identify a few sure winners as the place to start the transition to a paperless process. It is important to show success early as a way to gain buy-in and build momentum. This will help users understand the benefits of going paperless and will build momentum as you move from less – and less - paper to a paperless environment.

2 - It's the People not the Technology

You certainly want to pick technology which assures a stable, fast, and easy-to-use environment, but the *users of the system drive the success or failure of going paperless*. This is especially true with going paperless because of the direct impact on how people work and the uncertainty this will create.

To assure success:

Get Senior Management Buy-In: The process cannot begin without getting buy-in from the firm's senior management. They must understand the benefits and be stalwart in their support for the initiative. Giving in when a senior member of the firm insists on printing his letters so he can sign them with a pen – is not an option.

Find a Champion: A champion will be the voice of the initiative and will be able to offer proof the benefits of going paperless. The project champion can help mitigate user uncertainty (and often outright fear about not being able to 'get it'). Its great if the reception really likes the idea but it's even better of the Chairman of the IP Group really likes the idea – the more senior the better.

Create a Committee: The person or team leading the project will get invaluable input from a committee representing the various practice areas and line-of-business teams in the firm. The committee will be a way to give members of the firm a voice and influence project outcomes. As an example, the committee member from the Real Estate department will be

responsible for getting input from members of that department to be presented to the committee.

Going
Paperless



It takes a Plan

It takes People

It Takes Technology



Communicate the Plan: And Plan to Communicate. Members of the firm must know what changes are coming, and when to expect them. This will be reassuring and will eliminate surprises. When you're changing how someone works, surprises are not good. It will also create a sense that they are "included" in the project – not just innocent bystanders.

Training: No matter how elegant or clever the software, plan on delivering training. Training should be adapted to the type of student and leverage a range of delivery methods. A catalog of 5 minute videos – available on most smart phones – can be an excellent way to deliver training on specific topics like "scanning multiple documents" or "finding today's mail in the system", especially for busy professionals who need targeted answers that can be digested in minutes...

3 - The Withering Back File

The existing archive (not active paper files) of paper documents is your back file and is typically stored off-site or in very low cost space on-site. Storage costs are usually low enough to make it economically impractical to scan this collection (rough estimate is \$120 per box to scan). Short of some very compelling reason, **only plan on scanning files if they are frequently retrieved from storage.** The remainder of the back file will shrink over time to zero as files are culled subject to the firm's retention schedule.



4 - Key Technology Pointers

Going paperless certainly includes technology, and here are a few things to consider:



- Scanners: Pick the scanning hardware which matches your requirements. Are you designing a self-service environment using smaller scanners widely distributed among users, or a more centralized environment with fewer but higher-volume scanners? Do you need duplex scanners for simultaneous front-and-back scanning? Do you flat-bed scanners for certain types of documents? How will the scanners integrate with applications like document management?

A key metric with scanners is pages per minute. Start with an estimate of the number of pages you expect to scan per day and divide by (the number of minutes in a workday multiplied by a percentage of scan time which accounts for start / stop / document prep). Your pages-per-minute might look like this:

$$\text{Pages per Minute} = \frac{100 \text{ timekeepers} \times 100 \text{ pages per day} = 10,000 \text{ pages per day}}{480 \text{ minutes} \times .70 \text{ (20 minutes of start / stop / prep time)}} = 29 \text{ pages per minute}$$

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The result is an average pages-per-minute needed to cope with your daily volume. Companies like [Kodak](#), [Fujitsu](#), [HP](#), and [Panasonic](#) offer a wide range of scanners, so you can purchase large-fast and small-slow scanners from a single source.

- OCR Technology: there is no point scanning a document into a content management system without a way to find it later. If the scanned document has been OCR'd then it can be located with full-text searching which is flexible and familiar. Consider Docs Corp's contentCrawler for an excellent OCR "appliance" that can automatically convert a backlog of files – or look for new files – and convert the files to searchable PDF format.
- Zone-OCR: look for solutions that can automatically read portions of a scanned page to pick out invoice numbers, addresses, names, or other attributes which can then be used for automatic classification of the document or as a way to instigate a workflow.

Solutions providers to consider for OCR and Zone-OCR software include [Psigen](#), [Kofax](#), and [cVision](#). For those who want to write their own solution, check into [Accusoft](#) Pegasus, who deliver a family of SDK tools.

- Monitors: The monitor is a key interface between the user and the paperless environment. It sounds simple enough but test your choice with users before making the investment. Is it large enough to be easily legible? Can the user arrange several pages on the screen real estate? I use a 26-inch Insignia brand TV as a 2nd monitor, which gives me ample real estate (12 ½ inches high in landscape orientation so I can display a full page at full size) and very good resolution. It also doubles as a pretty good way to watch the game – time permitting.

Going Paperless – Now lets get Started

Keeping all of the foregoing in mind means "going paperless" in a way that assures success for the firm and the people involved in the process. **Make your plan, communicate it, and let's get started!**