Pursuing the Possibility of a
Paperless Office

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There are many advantages to going paperless: electronic files allow better access and information sharing, cost less in terms of physical space and personnel, and can increase productivity – all of which add to the bottom line.

Why, then, have so few organizations fulfilled what many have set as a goal: a paperless environment? For many, it may be the cost – not only the cost of converting paper to electronic files, but also the cost some employees fear they will pay in giving up paper.

Understanding the People Problem

The irony is that these same people likely use smart phones and tablets to manage every aspect of their personal lives, embracing the ease of electronic transactions and the advantages of mobility. But the office is one area of their world where paper still works.

Although they use electronic documents in the office, they often don't manage them well. They have folder structures that go 10 deep, which made sense when created but are now the cause of carpal tunnel syndrome for all the clicks required to get to the needed documents.

So, they resort to saving their electronic documents to the desktop where they know they can find them – except soon their monitors become mirrors of chaos that make them long for those paper file folders. So, when they finally find the documents they want, they print them so they can finally get to work on what started their searches. For a single moment, they feel a sense of control and inner peace. It's no wonder they meet the idea of a paperless office with such resistance.

Getting to the Root of the Problem

In many organizations, the introduction of a new technology is not a good experience. Employees are frequently given access to it, but they are not provided training or a succinct model to follow. This leaves them feeling lost and frustrated.

Their questions about converting paper to digital files will likely include very fundamental ones: "What do I call it?" "Where do I store it?" "How do I access it later?" and "How is it secured?"

They may also be confused about compliance issues. They might ask: "Is the digital version a copy – or a record? If I destroy the paper, is the digital version now considered the original?"

Therefore, as organizations begin to talk about going paperless, employee paralysis may set in. This is natural. People often dig in their heels when they perceive that something is being taken from them. Some will cling tightly to their desire to keep paper just because they are told it is going away.

The need to understand, acknowledge, and address these responses is one of the most underestimated elements in implementing change. Involving staff in the investigative stage of such a project will help them buy into it. Work with them to identify how they use paper, and ask them to document their workflows. Give them "what if" scenarios that will help them understand whether these paper processes are valid or if they exist only because they have "always been done that way."

People also need time. Even the best plans will be easily undermined (or sabotaged) if people are not allowed time to adapt. In addition to providing sufficient transition time, education, and training on new processes and procedures, organizations must earn their employees' confidence by ensur-

ing that they can continue to be productive during the transition from a paper to a digital working environment.

Realizing that Technology Is a Tool, Not a Solution

Organizations that get past this initial resistance will have another hurdle if they begin looking for a technology "solution" before they have identified their unique needs for the paper scanning project. They need to realize that technology is a tool – not a solution. Document scanning, automated workflows, and cloud storage are all tools that may contribute to the paperless office solution, but that cannot be determined until an organization identifies its needs.

Identifying Needs

Despite the benefits of document scanning (for both current and back-file collections), organizations should not aim to go paperless in one shot. It is critical for them to evaluate what files, perhaps even what specific documents, will address their core objectives.

For example, an organization may determine that scanning executed contracts is the solution to their need to provide access to multiple users or for reducing resources dedicated to researching these contracts before executing new ones. For organizations that don't have those needs, scanning executed contracts may not be a good solution.

That is why it is important to bring all stakeholders into the needs analysis at its inception. This fosters a culture of informed decision-making, prevents lengthy and duplicative processes – including the need to "sell" the concept to some stakeholders after decisions have been made – and ensures alignment with high-level objectives.

Key Decision Points for Moving Toward a Paperless Office

Important factors for deciding to convert paper information to a digital format include whether it:

- Solves operational issues, such as providing access to multiple users or to remote users

- Allows the information to be used in innovative ways

- Provides opportunities for operational improvement and efficiencies

- Makes it less expensive to use and preserve during its projected life cycle

- Aligns with the Generally Accepted Recordkeeping Principles©

Determining the ROI

Organizations that are committed to continuous improvement understand the straight-line relationship between specific processes and their hard cost return on investment (ROI). But, analyzing the hard costs for converting paper to digital format is not as simple as comparing the cost of scanning a box of documents to the cost of storing it offsite. Several other factors need to be considered.

Hard Costs

In addition to determining the actual costs associated with converting paper documents to digital ones, organizations need to consider at what point in the paper's life cycle they intend to do the scanning. This is because as paper moves through its life cycle, it not only loses value, it also begins incurring hard costs for such activities as retrieving, re-filing, transporting, storing, and – for the majority of paper – destroying it. Clearly, scanning early in paper's life cycle reduces hard costs.

Organizations also need to consider how good their policies and procedures for managing paper records are. Their hard costs will be even higher if they do not have good policies or if they have high personnel turnover, as those factors can result in escalating, perpetual offsite storage bills. If no one is really sure what's in all those boxes, no one will want to pull the trigger to have it destroyed.

Soft Costs

Some organizations fail to consider the soft costs involving resources. Add sections to the analysis that include a reasonable estimate of intangibles, including workflow efficiencies and the benefits of electronic formats for worker mobility, disaster recovery, and security.

Other Considerations

Organizations should not approach document conversion as a "scan it all or do nothing" decision. In fact, the best decision may be to focus the ROI analysis on smaller projects that will stop the growth of paper or address large collections of legacy paper.

Factors to consider for inactive documents. For example, by scanning inactive documents that have a long (or permanent) retention requirement, not only will the cost

of storing, retrieving, and returning the paper be eliminated, but the information will be much more accessible and usable.

On the other hand, scanning inactive documents that are close to their disposition date may have little value, especially if key data was captured in the creation stage.

Factors to consider for active documents. For organizations that need time to prepare for change, implement tools, and provide training on managing electronic documents, keeping paper during the active part of its life cycle may make the most sense.

Other lifecycle factors to consider. Organizations must also remember to determine the value of converting paper at each of the stages of its life cycle to identify the true ROI. This also will help them determine whether they should begin their paperless office project with their legacy information or work on a day-forward basis.

Coming Down from the Cloud

Records and information management (RIM) professionals have made their way out of the basement. To find answers for dealing with information being created by social media, instant messaging, and e-mail, many have made the leap to the clouds. For some, though, that has meant neglecting their organization's years of legacy information that doesn't have wings.

Meanwhile, employees are doing everything they can to hold on to what they know – in this case, paper – so they can do what they need to do. Paper isn't going away for quite a while, and RIM professionals need to be okay with that. People need information in whatever ways allow them to be efficient.

But, RIM professionals also need to be fiscally responsible, and dealing with paper – both legacy and active – by converting some to digital files may be the most fiscally responsible thing to do. For them, developing and implementing plans that make sense for the way business needs to be done and allowing paper that is created or received to be used, scanned at some point, and then shredded allow all stakeholders to be satisfied. **END**

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