

## Checklist for Going Paperless in the Office

Every office worker knows the problems with paper records: they can be lost, they are difficult to share, they take up a lot of space to store, and are time-consuming to file. Going paperless at work has huge appeal. But how do you start making the transition replacing paper with an electronic document management system (EDM)? And how do you get all of your employees to give up the paper documents that they are familiar with to adopt a completely paperless office?

Let's take it step-by-step. Here's a simple checklist to take you through the process of going paperless at work.

### **Select a cloud-based document management system**

When you suggest the idea of going paperless at work, you may come up against some hesitation from the IT department. An EDM often means more work for IT, and no additional resources. As IT often works with limited resources and budgets, they can often slow the implementation of a document management system.

The solution is to select a cloud-based EDM, which requires fewer IT resources.

- No new server or other hardware needed
- No additional software
- No SQL licenses
- Provided third-party security audits (SOC-2)

Cloud-based systems will avoid further strain on your IT department.

### **Assign Implementation Responsibility**

Chances are that no person or department will jump up to own the responsibility for the EDM. The key to an effective implementation is for a C-level executive to identify a Document Management Group and an individual who will own the implementation, with the power to make decisions, train staff, and enforce usage.

### **Identify Cost Centers**

The cost for the document management system may sit entirely with the Document Management Group, which we mentioned above. It may also be shared with IT, operations, or other departments. The C-level executive should identify where the budget responsibility for the EDM lies. At this time, the ROI for the initiative should be explained, and a portion of the potential savings may be allocated to the cost centers.

### **Create a Schedule for Going Paperless**

There is no ideal time to institute electronic document management. Every office is busy, with new initiatives, big projects and financial constraints. However, postponing the move to go paperless just delays the end results that made you decide to go paperless in the first place.

The efficiency improvements and return on investment from the EDM are within your reach! Just do it. The sooner your paperless office becomes a way of life for all of your employees, the sooner you can more efficiently tackle the daily challenges that keep coming up.

## **Train the Trainers**

One of the first steps in the implementation of an electronic document management system should be to train the administrators. It's important to feel confident not only that your company will be able to get complete adoption of the EDM, but also that you can easily change and adapt the system to meet the future changing needs of your office.

Administrators should be trained to:

- Create electronic forms
- Develop workflows
- Initiate new document management projects
- Set new document types
- Establish retention schedule

This in-depth training will enable administrators to keep the EDM up-to-date and responsive to your office needs. As new processes are developed in the physical world, an electronic system can be created to support it.

## **Train Every Employee. (Then train them again.)**

Once your company has selected and installed a document management system, the key to implementing it smoothly – and getting everyone on board and adopting the new system – is to provide sufficient training. The goal should be for every employee to understand:

- How to do all of their tasks in the new EDM
- How the EDM is better than using paper, and will save them time and effort
  - easy capture of documents
  - trouble free search
  - intuitive workflows
- The benefits of the EDM, both for the individual and the office as a whole

## **Start the Implementation with a Single Department**

To make sure that the implementation process is comprehensive and consistent, launch the electronic document management system one department at a time. This approach will prevent holes in the process (for example, a document type or procedure that still operates in paper or perhaps runs on a second document management system such as a vendor's web portal). Any hole like this is a source of inefficiency, and should be wrapped into the EDM.

Select a department to start with. Once that department has been completely transitioned into the EDM, move on to the next department.

## **Make a Comprehensive List of all Documents**

Identify all of the documents and functions needed to do the work of the department that you are focused on, and note the sources of these documents. Are they printed, emailed, or generated by software?

## **Define How Each Document will be Captured in the EDM**

Every document needs to have an electronic home and capture method – both existing documents and those that are received in the future. This may include:

- Batch uploads
- Virtual printers or print to PDF drivers
- Emailing documents into the EDM
- Faxing documents into the EDM

☐ **Work with the Hold-outs to Achieve Complete Adoption**

Almost every organization will have some person who likes doing things the old way. If everyone is using the document management system for their work and is completely paperless, and one person isn't, the organization will be forced to work in both digital and paper. You'll have to ask that person where their records are because they won't have put them in the document management system in a timely manner. That one person ends up doubling the amount of work that everyone must do.

If your office has a hold-out during this process, more training may be needed. Don't give up! The key to going paperless and making it as efficient and effective as possible is getting every single person on board.

**Planning on going paperless at work?** It can be a big undertaking, but one that is well worth the investment. You can get help with the implementation process. **Contact us today to learn more.**

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