

World Paper Free Day:

Four Basic Steps to End Your Reliance on Paper

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Transitioning from a paper to a digital environment lets us streamline large volumes of extraneous paper while making our documents and information systems more secure and useful.

October 28 marks the advent of World Paper Free Day. Its focus: reducing paper consumption. Recent projections from the Association for Information and Image Management (www.aiim.org), global event organizer, indicate we'll have nearly ten times more information in 2011 than 2006; much of it remains on paper. Whether we're motivated by global warming, civic responsibility, concern for our dwindling forests, or a need to contain costs, we must act. We must gain control over the information that flows into, through, and out of our businesses.

Luckily, we have the collective tools, knowledge, and experience to quell our addiction. To make progress, however, we must accept that a less-paper world begins with smart (human) choices, not technology alone; even smart technology defers to our rules. We know our dependence on paper is unsustainable. The question is: Are we willing to change?

The call to reduce our individual and collective carbon footprint doesn't mean eliminating all paper. It's just not practical. Instead, it's an appeal to control paper output and use information more wisely. Seminars, expos, and worldwide 'tweet jams' are educating people so they can make economically smart choices that are better for our environment. It's a unique opportunity to become more cost-efficient and competitive while converting to a sustainable business model.

Responding to the call

Paper dependency is too vast a problem for big business to solve alone. Thus, AIIM's call to action focuses on little steps we all can take that have a huge collective impact:

1. **Conscientiously choose not to PRINT.**
2. **Participate in (or produce) a local Paper Free Day event.**
3. **Investigate a business process or technology that can lessen paper waste in your office.**

The first is self-explanatory: consider whether you need a hard copy rather than habitually printing. The second requires perusing local media or

performing online searches for paper-free events. If you're considering the third—wondering if there's something you can do beyond what you've already tried—read on.

Leveraging existing information systems

Transitioning from a paper to a digital environment lets us streamline large volumes of extraneous paper while making our documents and information systems more secure and useful. Rather than employees searching for information, it's appropriately accessible to those whose tasks demand it, wherever they are.

How do we leverage our systems and people?

1. **Web-based electronic document management (EDM)**, letting you secure files, centralize access to scattered repositories and business systems, and make documentation available to the right people, 24/7.
2. **Business process management (BPM)**, combining business rules with your digital documents and data to standardize document handling, improve processing speeds, and increase cost efficiency. Routine processes advance automatically, following your standard conventions. Integration with core information systems ensures relevant documents arrive on time for prompt, compliant handling.

Automating your processes frees knowledge workers to focus on higher-level work for which you employed them rather than cumbersome tasks such



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as searching for answers, matching associated documentation, juggling deadlines, and routing documents. Why accept mediocrity from your systems and people if you can provide the tools to exact excellence?

Four small steps that produce big results

If you're ready to invest in change, these options will extract more value from your information systems, delivering significant ROI in a short period of time. Transformation starts by eradicating paper. Maximizing the results depends on matching the right solution to your needs.

1. Front-end scanning: end secondary paper waste and make information instantly useful

Although converting hard copies to electronic clearly doesn't restore the trees used to create the paper, EDM is far more than just a convenient digital replacement. Scanning documents upon receipt eliminates secondary paper waste while making processing more efficient:

- Important content is instantly accessible to authorized persons for review or action.
- Continuous remote access means document review and processing can begin immediately, from any location, eliminating unnecessary paper and processing delays.
- Documents are secured quickly.
- Your rules about who can view, annotate, sign, or delete files ensure governance is enforced.
- Productivity and accuracy increase.
- Cost-efficiency reigns.

Scanning at the end of the document lifecycle assists future search, but you lose the real benefit. Capturing documents upon receipt generates far greater savings.

2. Electronic forms: make information instantly useful while eliminating paper

Web-accessible electronic forms don't just eradicate paper. They also:

- Enable employee and customer self-service, 24/7.
- Standardize data collection.
- Ensure information is complete and compliant.

- Make form content immediately secure, appropriately accessible, and actionable.

If you have paper, scan it, but assess what you can capture electronically. eForms regulate and improve data collection, increase processing speed, and help to create a cost-efficient, sustainable business model. It's a smart way to go.

3. Embed data in bar codes: reduce errors and paper

Bar codes reduce costs and turnaround for processing return (incoming) documents. Printing bar codes on documents you mail and plan to re-collect increases data accuracy, saves paper by embedding data in a small space, lowers processing costs by reducing manual intervention, and increases overall efficiency. Using bar codes on outgoing documents lets you:

- Scan, index, and process return mail efficiently.
- Re-use data stored in bar codes, eliminating data entry.
- Associate incoming documents with the correct files.

Since the accuracy of bar codes rarely dips below 100%, ROI is swift and significant.

4. Route work electronically: avoid duplicate copies and redundant work

The greatest savings emerge from process automation, which is the next logical step after converting to a digital environment. Examining, improving, streamlining, and automating routine administrative processes—using business rules and stored information about your documents—let you:

- Automatically prioritize tasks and distribute work using data and business conventions.
- Use incoming documents to initiate business processes, shortening turnaround.
- Ensure meaningful data is pushed to and pulled from other applications where it's needed.
- Route documents simultaneously to multiple parties, accelerating decisions.
- Package associated documents for easier review and quicker approval.
- Enforce appropriate and timely document handling.

- Implement governance policies and provide thorough audit trails.
- Handle significant growth without increasing staff.

Getting started

For helpful guidelines, check out *Manager's Checklist for Transitioning to a Paperless Office* (2009) and *Manager's Checklist to Ensure Successful Business Process Automation* (2009) available in the articles and references section on www.docfinity.com. As you mull over your paper and processing challenges, make sure you:

1. Understand your needs thoroughly. How do you envision your organization in two years? Three? Five? Match solutions to vision and need.
2. Choose robust functionality over a thousand bells and whistles you'll rarely use.
3. Select flexible software that will respond to the changing needs of your organization. Scalability and adaptability are vital to long-term solution relevance. System replacement is costly. Choose a vendor that will be a long-term partner in your success.
4. Integrate the software with your core information systems. Know your vendor's capabilities in customization and professional services, as well as their fee structure. Understand your vendor's strengths and limitations. Ask for references.
5. Choose a product with a user-friendly interface and interactive tool tips that help users adapt and succeed. Give employees the training they need to proceed confidently. Notice their efforts. Commend progress.

Commit to change – then follow through

Great strides start with small steps. Whether you read this before World Paper Free Day or long afterward, this is a good time to take stock of your business, consider where you want to be, and take at least one step toward becoming more efficient. Eradicating extraneous paper and the habitual reliance on it produces immense rewards. Both you and the environment will profit.

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