

Going paperless

an old story
with a new
meaning

Has the idea of making your organisation paperless been stuck in the “too difficult to solve” pile?

When the PC was invented, many thought that the paperless office was just around the corner.

Now those predictions are often laughed about - many don't think it will ever be possible ... at least not in their lifetime.

However, going paperless is definitely possible now ... and won't need creative ROI calculations to justify the cost of doing it.

What are the real benefits?

Going paperless can deliver dramatic savings – well beyond a few square feet of filing cabinet office space.

Organisations spend a vast amount of time handling, checking and processing documents – this might include inputting information, re-keying data or reformatting for other systems.

The routing of physical documents to different people in different locations can be avoided with electronic documents that are controlled and tracked with process automation tools.

Also, physical documents are usually only in one place (having multiple copies creates even more issues), so centralising storage and giving secure access to users will dramatically improve the flow and communication of information.

Automating these areas improves accuracy, quality and speed – and frees up time for staff to focus on more valuable work for the organisation.

Here's a list of what you should be looking to achieve to deliver dramatic cost savings.

- ▶ Automatic capture + processing of all types of documents (paper and digital)
E.g. invoices, scanned directly into accounts system with validation checks and approvals built into the process through to payment being approved
- ▶ Conversion of all documents to readable formats (Word, PDF, Excel etc)
- ▶ Fast search, query and retrieval from any PC, tablet or mobile device
- ▶ Automatic naming, indexing and filing
- ▶ Automatic handling of duplicates and document retention periods
- ▶ Secure access and audit log of all document access/change activity

Solving the puzzle

There's 4 main pieces to the puzzle:

1. **Mobile technology**
2. **Fast widely available broadband**
3. **Effective document workflow software**
4. **Affordability**

Points 1 and 2 are generally mainstream, commodity products now.

Point 3 and Point 4 are what stop many organisations going paperless.

Software is typically expensive to buy – and often expensive to implement.

Often, many days of “professional services” time has to be paid for ... and this is sometimes not able to be quantified until the customer has already made a financial commitment.

Furthermore, inflexibility in some software solutions means that the complete automation of documents isn't quite achievable, leaving the customer to compromise on the potential benefits but still pay a high price for an incomplete solution.

Choosing the right solution and provider

- ▶ Get the scope right – scan, capture, index, filing, with flexible workflow tools
- ▶ Ask for proof of concept
- ▶ Ask for fixed price project cost + clarify ongoing costs
- ▶ Do your instincts tell you that payback will be easily worth the investment?
- ▶ Does the provider have experience in workflow development and support?
- ▶ Are the benefits guaranteed?

What next?

If you'd like to find out more about document process automation technology, please contact the author, Mark Altman – mark.altman@altmanIM.com

About the author

Mark Altman is CEO of Altman Information Management Ltd, an EU based distributor of intelligent workflow software that helps organisations increase the efficiency of their day-to-day operations.



Mark Altman – March 2014