HOW TO MAKE YOUR ORGANIZATION PAPERLESS

Harold Clayton
Performance Improvement Specialist
Business Process Optimization

Associate Director - Career & Talent Development
Florida International University

THIS WAS AN ACTUAL OFFICE AT THE DEPARTMENT OF CHILDREN & FAMILIES

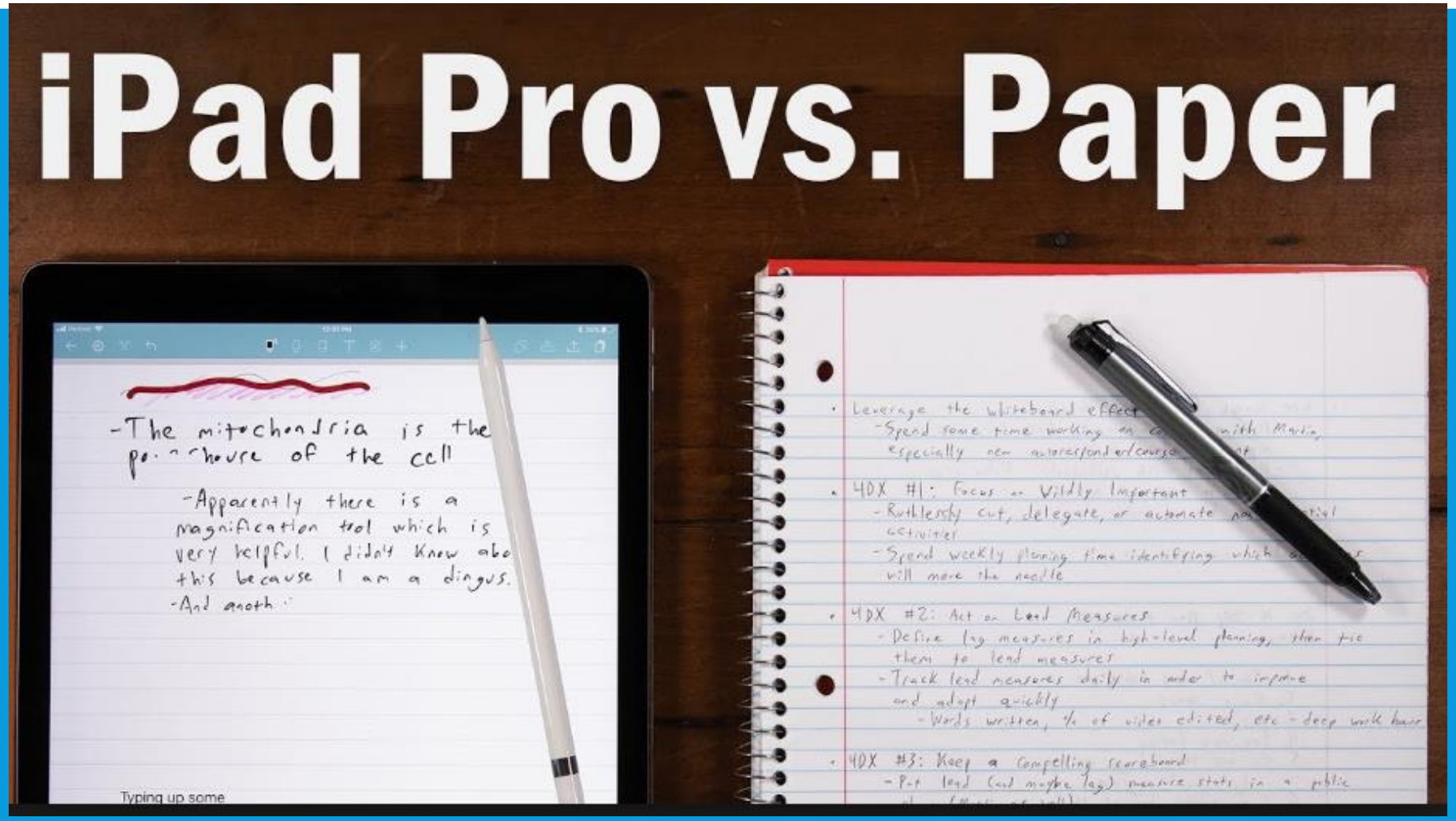
DO WE REALLY WANT A PAPERLESS ORGANIZATION?

DO WE REALLY WANT A PAPERLESS ORGANIZATION?

WHY PAPERLESS / PAPERLITE OFFICE?

GOING PAPERLESS IS MORE THAN JUST A PROCESS, IT'S A MINDSET

DOCUMENT MANAGEMENT SYSTEM: TRANSACTIONAL OR TRANSFORMATIONAL



PAPER-FREE PROGRESS: MEASURING OUTCOMES

AFFORDANCE

AFFORDANCE: the quality or property of an object that defines its possible uses or makes clear how it can or should be used.

Refers to the relationship between a physical object and a person.

An *affordance* is a resource or support that the environment offers an animal; the animal in turn must possess the capabilities to perceive it and to use it.

AFFORDANCE OF PAPER

AFFORDANCE: the quality or property of an object that defines its possible uses or makes clear how it can or should be used.

Refers to the relationship between a physical object and a person.

An *affordance* is a resource or support that the environment offers an animal; the animal in turn must possess the capabilities to perceive it and to use it.

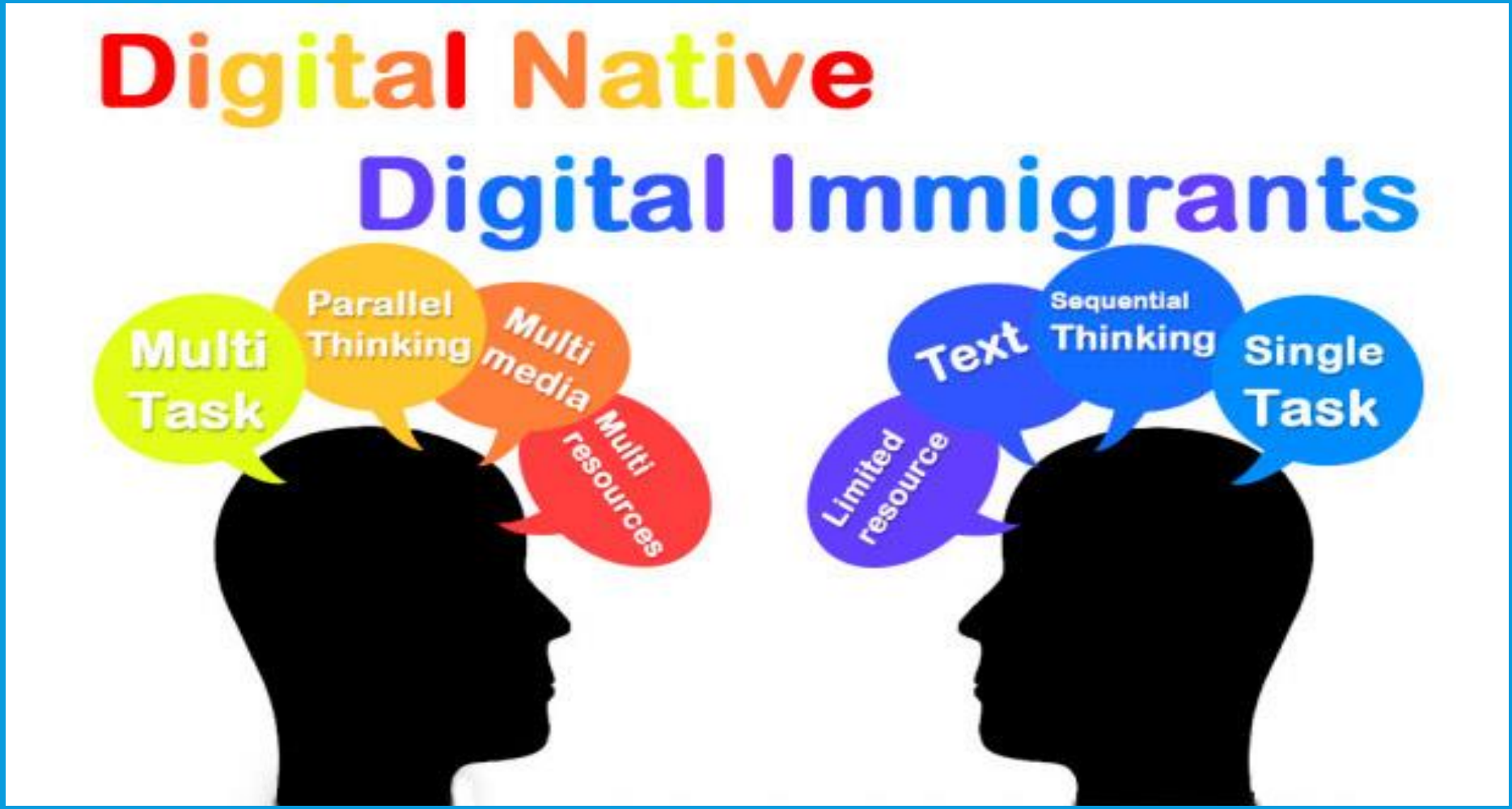
AFFORDANCE OF PAPER

- The Affordances of Paper project aims to understand the persistence of paper in the workplace by analyzing how the physical properties of paper support human work and interaction.
- Through both laboratory work and field studies of people using paper, we have discovered a wide range of reasons why people depend on it to support their work. Explanations exist at many different levels, from that of organisational culture down to the ways in which people use paper in particular tasks.

AFFORDANCE OF PAPER

- **PAPER IN SUPPORT OF READING**
- Paper supports in-depth reading because people can easily annotate documents while they read, can flexibly navigate through a document, and can spread pages out in space to read "across" multiple surfaces.
- **HAND DELIVERY OF PAPER**
- People may choose to hand deliver paper documents because it provides an excuse for social interaction with a colleague, allowing discussion of the document and personalising the process of delivery.
- **PAPER FOR COLLABORATION**
- Paper supports meetings and discussions because co-participants can easily see, at a glance, what documents others are attending to and where in those documents they are looking. Note-taking on paper is also easily interwoven with discussion.

WILL THESE AFFORDANCES ALWAYS IMPACT THE ORGANIZATION?



The world is changing - from the Physical to the Digital

Big Data

90%

of the data created in the last two years alone.

Mobile

1 billion (plus)

(plus) smart devices shipped in 2013 alone.

Social

81%

of customers depend on social sites for purchasing advice.

Cloud

62%

of total workloads will be in the cloud by 2016.

Internet of Things

50 billion

devices connected to the internet by 2020.

API Economy

Global m-commerce sales were

85 billion

in 2013 and forecast to rise to $120 billion by 2015 and an estimated $1 trillion by 2017

With digital transformation, Less is More

UBER

No Cars

Alibaba Group 阿里巴巴集团

No Inventory

airbnb

No Real Estate

FORCES DRIVING CHANGE…… WHAT RISKS ARE WE NOW FACING?

Before	Now
Spoke via landline phone	Mobile /video devices
Wrote letters	Instant - Social media
Business done in person or forms	Online
Filing cabinets; Folders on shelf; folders on computers	Cloud
Mostly 1:1	Many: Many

ACCESS TO INFORMATION IS CHANGING …… WHAT ARE THE RISKS?

Before	Now
Access to systems via desktop/laptop	Mobile devices (smartphones, iPads, tablets)
Lectures in class, paper notes	Lectures: Online; Recorded and archived
Library – physical books	Library: eBooks and Electronic journals
Structured environment	Workflow, email, internet, video collaboration, social media Facebook/Twitter/Linkedin/Pinterest, cloud computing
Signage – physical notices or boards	Signage: Digital and content updated remotely

IMPACT OF DIGITAL TRANSFORMATION

First, how can one define digital transformation?

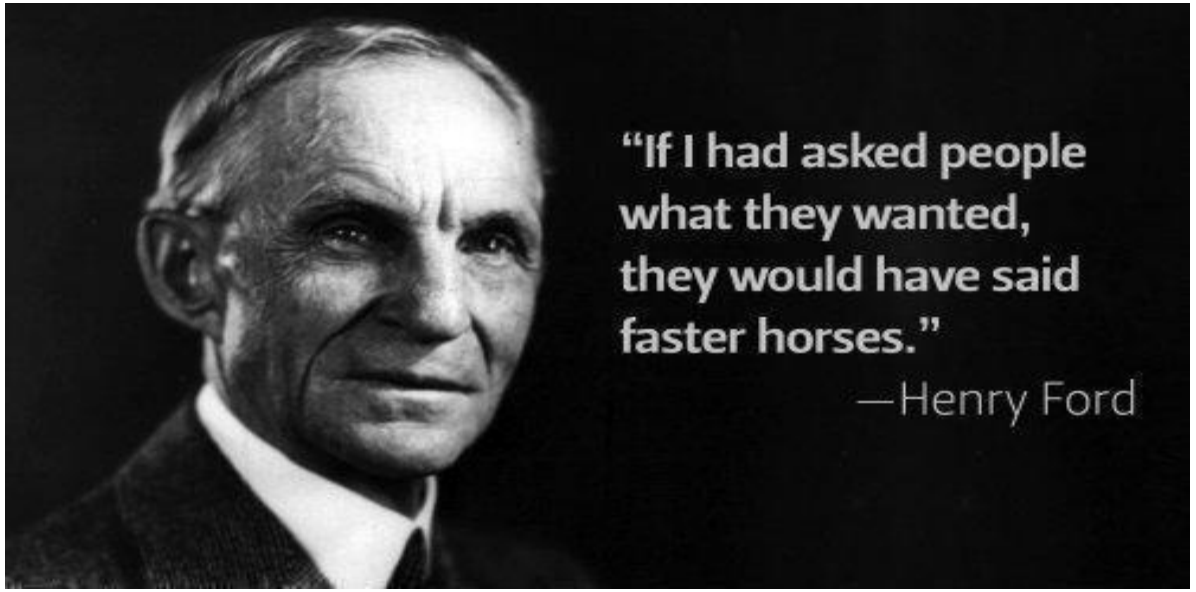
Second, we will discuss in terms of:

- The Good
- The Bad
- The Ugly

PRACTICAL STEPS FOR GOING PAPERLESS

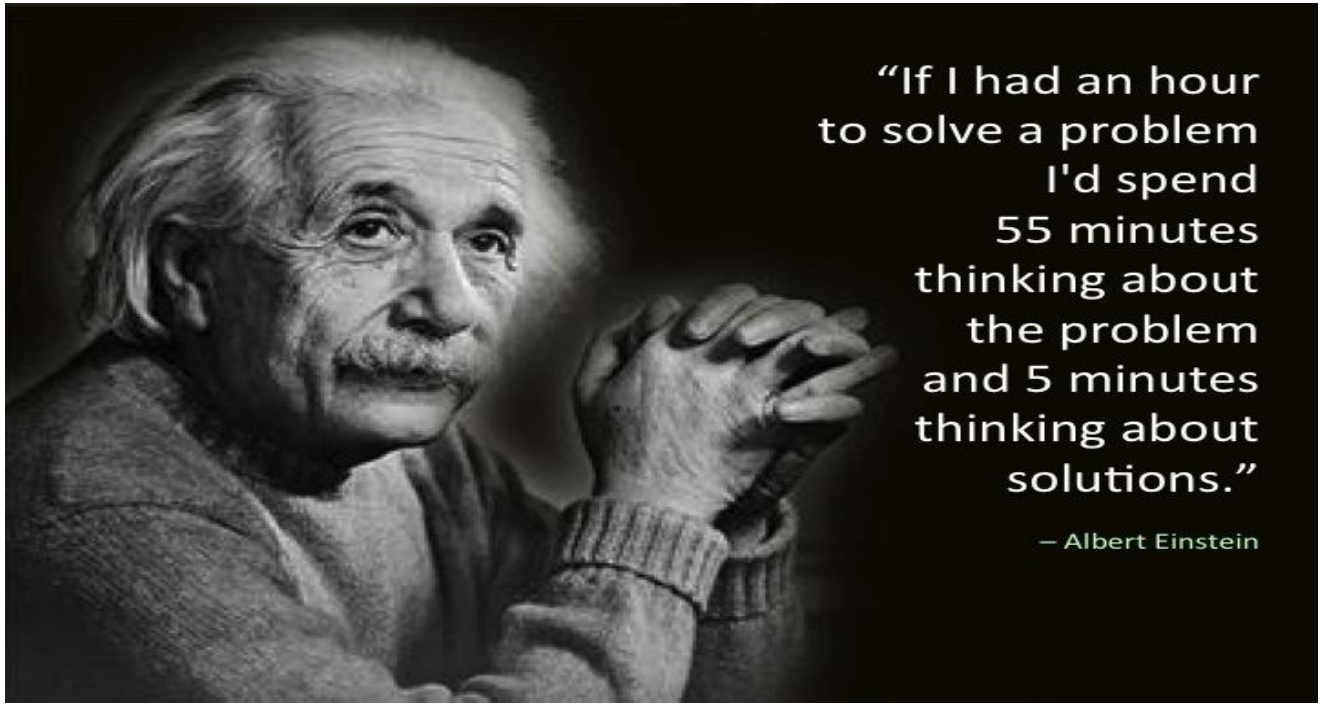
1. Company culture - establish a plan
2. Create an enablement team – task force
3. Legislative obstacles - compliant or not?
4. Document Management Software or an Enterprise Content Management or Cloud Storage
5. Copy documents with scanners and scanner apps.
6. Switch to Paperless Billing, Payments & Receipts
7. Paperless meetings
8. Electronic Conmmunication
9. Paperless tasks and memos
10. Mobile 1st work environment
11. Paperless signatures
12. Choose a PDF software

COMPANY CULTURE – ESTABLISH A PLAN



- Change comes from within.
- Every attempt to change "the way we work" has to be implemented from within and from top to bottom.
- Going paperless might sound like a small effort, but, as with any task, it is not as easy as one two three, and requires carefully thought-out planning and implementation.

CREATE AN ENABLEMENT TEAM – TASK FORCE

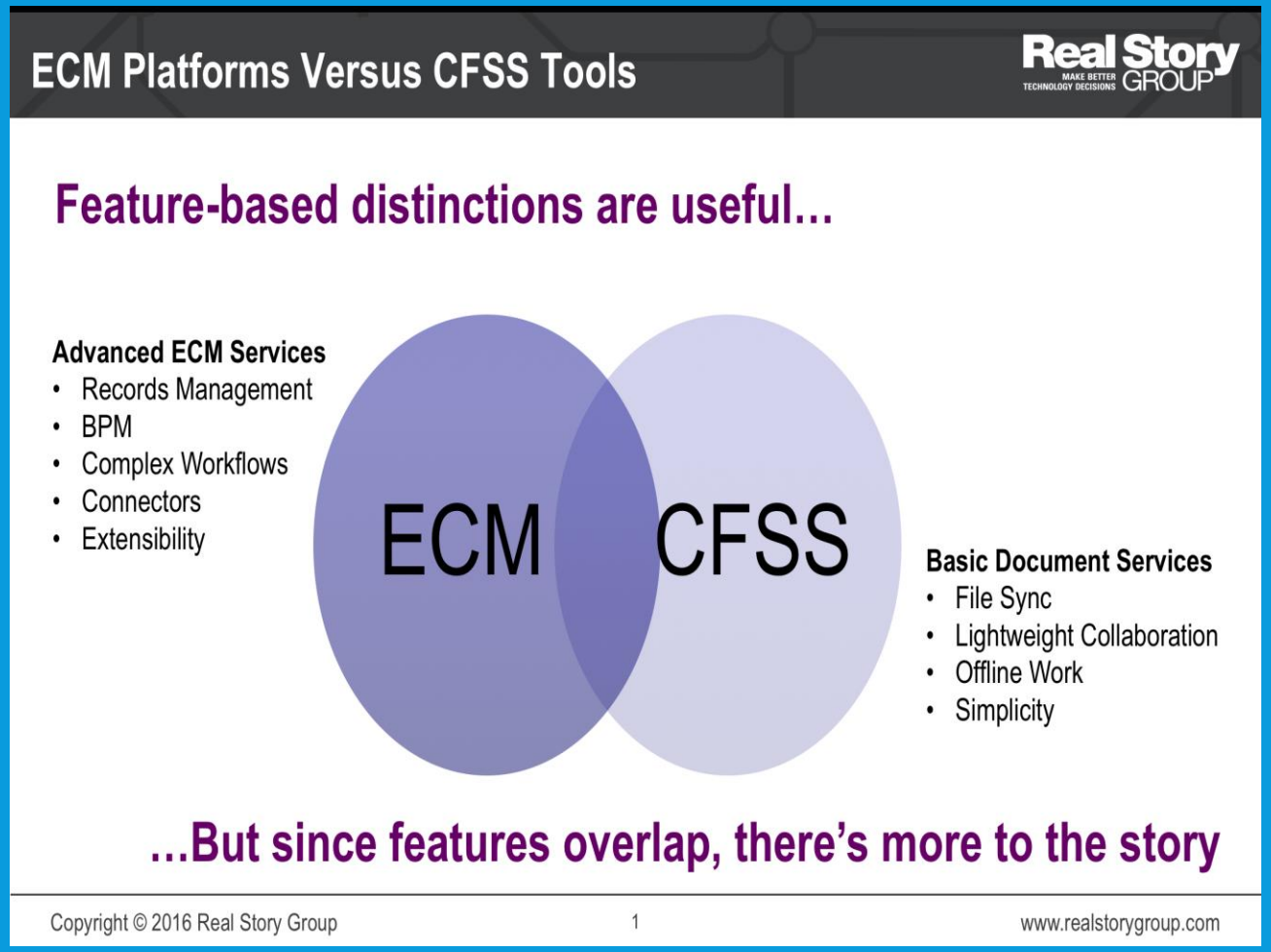


- A paperless office means each and every employee is committed to making the change.
- Before you can start saving time, you most probably need to invest some hours in internal training.
- Going paperless means you need to digitize and semi-automate multiple company processes. And doing this means you will need people who lead by example and are there to train the employees who might not be so technically savvy.

LEGISLATIVE OBSTACLES – COMPLIANT OR NOT

- Before Digitization, be aware of compliance regulations.
- Do they require you to retain actual copies of documents with an "inked signature" for a certain period of time?
- Do they accept Electronic signature?

DOCUMENT MANAGEMENT SOFTWARE OR AN ENTERPRISE CONTENT MANAGEMENT OR CLOUD STORAGE



One of the most essential factors in moving towards a paperless office is putting all existing documentation into a digital form and storing it in a system which is accessible to all necessary personnel.

- **EXAMPLES:**
  - Dropbox
  - Google Drive.

COPY DOCUMENTS WITH SCANNERS AND SCANNER APPS

Scan existing documents into PDF format and upload the copies to the cloud.

- Printer's scanner
- download a scanning app to your tablet or phone.

As a security precaution, shred documents after uploading them.

If you absolutely need hard copies of a document, store them in a safety deposit box as part of your business's disaster recovery plan.

SWITCH TO PAPERLESS BILLING, PAYMENTS & RECEIPTS

- Makes your life easier.
- Saves you money.

  - Avoid late fees from misplaced, forgotten or lost bills
  - Improve security: believe it or not, paper bills leave you vulnerable in many ways to theft
  - Save money: post is expensive
  - Save time in finding each invoice in its correct place in a matter of seconds

PAPERLESS MEETINGS

- Digital meetings actually have numerous benefits for both the organizer and the participant. Benefits for the organizer:
  - Set up complex agendas in minutes
  - All participants are up to date with all changes to the current agenda
  - Prepare and update the material in an interactive environment
- Benefits for the attendee:
  - Obtain all meeting information and material earlier
  - Be up to date with any changes in real time
  - Have all meeting notes easily accessible in digital form

ELECTRONIC COMMUNICATIONS

(RESIST THE TEMPTATION TO PRINT)

Email offers faster communication than sending letters, you generally get a faster response from the recipient and you have a copy of all communication on your computer.

Text messaging to send memos is increasingly popular.

Paperless Faxing.

Electronic calendars enable small businesses to schedule conference calls, client calls, meetings and time off without wasting paper.

PAPERLESS TASKS & MEMOS

- Switching to paperless task lists, memos and notes can appear easy, especially with your document management software now supporting many kinds of options for sharing information.
- Excellent opportunity to take on an external solution specialized in taking notes and creating tasks, all with the option of collaborating on them with your team members.
- Ability for team's tasks and notes to be synchronized across all your devices, and to collaborate in real time.

- **Technology & Apps**
  - Evernote
  - Google Doc
  - Todoist Premium
  - Asana
  - Any.do

MOBILE WORK ENVIRONMENT

TECHNOLOGY INNOVATION
<MOBILE SOLUTION>

Encourage employees to utilize mobile ways to digitize documents suitable for your office environment.

PAPERLESS SIGNATURES & PDF SOFTWARE

- A few examples of software that includes paperless tools are:
  - Adobe Reader,
  - Adobe Acrobat,
  - Docusign, and
- To get started, you must first create a signature, which is often the hardest part because signatures tend to look sloppy when made with a mouse, finger and touchscreen, or stylus.
- . After you create and save a signature, you can use it over and over
- Once all documentation is digitized, it is fundamental to know how to edit, convert and manipulate different file types in order to maintain the new paperless ecosystem.

PDF SOFTWARE

1. Company culture - establish a plan
2. Create an enablement team – task force
3. Legislative obstacles - compliant or not?
4. Document Management Software or an Enterprise Content Management or Cloud Storage
5. Copy documents with scanners and scanner apps.
6. Switch to Paperless Billing, Payments & Receipts
7. Paperless meetings
8. Paperless faxing
9. Paperless tasks and memos
10. Mobile 1st work environment
11. Paperless signatures
12. Choose a PDF software

PAPER-FREE PROGRESS: MEASURING OUTCOMES

SELL PROBLEMS, NOT SOLUTIONS

"[People] let go of outlived arrangements and bygone values more readily if they are convinced that there is a serious problem that demands an ending."

Managing Transitions - Making the Most of Change
William Bridges

PAPER TO DIGITAL OFFICE GOAL

- Conversion of information from paper to electronic format.
- More importantly : Identify opportunities to eliminate paper as the vehicle for providing information at the source of origination.

THOSE WHO THRIVE IN THE DIGITAL ECONOMY WILL NEED TO

IN RETURN, THEY WILL

Develop And Execute A Vision For Digital Transformation

Take An Ecosystem-first Approach To Delivering Products And Services

Manage Information Effectively

Create Flexible And Reliable Human Resource Model

Optimize Business Processes For Speed, Efficiency, Quality, And Agility

IDC Analyze the Future

EMC² Pivotal RSA VCE vmware

How will we work in 2020 and beyond ?

- People — Agile and flexible working styles
- Process — New and improved technology
- Place — Contemporary work settings

Modern Working

combines people / process / place

THANK YOU. QUESTIONS/ COMMENTS

Harold Clayton
Performance Improvement Specialist
Business Process Optimization

Associate Director - Career & Talent Development
Florida International University