



Digital Document Solutions

Creating the Paper Light Office



Creating a “Paper Light” Office

Evidence suggests that rather than attempting to become paperless, a more valuable and realistic goal should be to become “paper light”. This document considers the challenges businesses face and provides practical guidance on why and how to make the journey to a paper light future, with a focus on security, access and harnessing the value of the information.

Every year at least one study states that organisations are creating and using more and more paper documents than they did the year before. In fact, the use of paper is actually increasing in a third of firms. Companies are trying to become more efficient, cost-effective and keep their information secure. To do this they must; improve the way they control the inflow of paper, manage documents that are essential to the business and decide how they make use of paper documents.

Trying to impose a complete ban on paper is clearly not the answer – and it doesn’t address what to do with the legacy paper archives you’ve already built up.

At ITQ we believe that the best way forward is to embark on a journey that embraces digital and paper in a paper light environment. Going paper light is about gradually reducing your dependence on paper, introducing a managed and cost-effective digitisation program and taking your employees and processes with you every step of the way. It’s about helping your business to release the full power and value of information in a way that is both realistic and achievable.

The first thing to do is to identify and collect the ‘inactive’ paper – those documents that you no longer need or are unlikely to access. Get them into a secure environment where the paper can be managed against defined retention periods but still accessed if required but scanning is not viable. Then it’s time to transform how you handle your active documents across the business. People keep information close to hand because they want to refer to it regularly or get to it quickly. They need to have an acceptable alternative that combines ease of access with the benefits of secure storage and management.

Some employees are confident that, although they have significant amounts of paper documents in the workplace, that the paper is well organised and under control. They feel comfortable that they can access the documents they required easily and that their paper-based information is well managed. However many others are concerned that their businesses are failing to manage paper records securely, leaving sensitive and confidential information at risk of exposure. Situations occur such as confidential employee documents and business records on display in the office, either left behind on photocopiers and printers, or left out on desks. Office workers are typically seeing sensitive documents relating to colleagues’ salary or bonus details, performance review or appraisal information and company financial information.

TRIMMING POSTAGE COSTS

ITQ implemented a network scanning solution that played a major part in reducing the massive postage costs associated with sending printed documentation within the Exclusive Hotels Group.

It had been common practice to post invoices and purchase orders. Scanning documents and sending them by email is easier for the sender, faster for the recipient and cheaper for the group.

In addition there was an unmanageable print infrastructure. A diverse range of printers and multi-functional copiers the group had used in the four hotels and the fragmented support arrangements each hotel negotiated was replaced by ITQ with a solution that was simpler to maintain, simpler to use and more reliable.



Adopting a paper-light approach is then about digitising the documents that will be needed. It is an approach that saves time and office space. It cuts through the paper chaos, facilitating faster access to frequently needed documents, helping employees to work smarter and enabling businesses to provide a better service to their customers.

The concept of the “paperless office” was popularised in the 1970’s and was intended to describe a vision of the future where businesses no longer used paper. This is far from the reality in offices today. Despite the use of computers, tablets and smart-phones and the creation of software solutions that can capture all kinds of information and send it flowing smoothly round an organisation – we simply cannot wean ourselves off paper.

Figures from AIIM suggest that the use of paper is actually increasing in a third of firms, three quarters of invoices that arrive in PDF format get printed and almost half of paper documents scanned were created digitally. As you aim to become more efficient, cost-effective and information secure you need to improve the way you manage and use all this paper.



A paper light approach, however, embraces secure storage and document digitisation. This helps you get fast access to documents you need, saves you time and space, allows your people to work smarter and provides a better service to your customers. ITQ believe that a commitment to paper light should go hand-in-hand with a commitment to harness the value of information; the source of “big data”.

However, there does appear to be a difference in perception between older and younger firms: those that have been in business for between two and five years are significantly more likely to anticipate a paper free future than firms older than ten years. What is holding them back? For the older firms, this could include a more extensive back catalogue of paper records and entrenched paper-based business processes. But with more than half of younger firms similarly sceptical about the eradication of paper, there must be more to it than that.

Obstacles to paper reduction:

The legacy of existing paper - Many organisations are finding it difficult to move beyond the first stage: getting to grips with all the paper they already have. Existing archives are often neglected or mismanaged. Many businesses store most of their paper records on office premises, and significant numbers going so far as to characterise their storage capabilities as 'chaotic', with little if any structure. Meaning some records placed in storage are never to be seen again. Storing documents in the office can be an expensive and high risk approach, with archives using up valuable office space and vulnerable to unauthorised access, heat, damp, atmospheric contaminants and even fire or flood. Half of businesses that suffer a catastrophic fire fail to continue, almost entirely due to lost data.

Signatures - A study by AIIM found that the top concern about introducing paper free processes was the need for a physical signature on a form, despite the fact that in many cases electronic signatures are now legally valid.

Lacks of understanding of the benefits of paper reduction - Companies are failing to understand how reducing the amount of paper can actually help them to achieve other business objectives (such as improving information security). One study found that a paper free environment ranks behind the use of information, information security and the implementation of social media in terms of business priorities.

The hybrid paper-digital information solution - There is considerable confusion and concern about how to handle the 'hybrid' paper-digital information solution. This is further complicated by the fact that information often moves freely between paper and digital formats, sometimes existing as both at the same time, and often being amended or updated in one format but not in the other. Research found that around two thirds of firms are concerned about the disconnect between information on paper *and* in digital form, and a third worry about the resource required to manage the factual accuracy, security and consistency across both digital and paper.

Employee behaviour - One of the overriding obstacles to paper reduction is the everyday reality of the office – a world where printers and photocopiers hum away in every corner and bins are overflowing with sheets of paper. In one study, it was found that fewer than half of office workers were aware of a centrally managed and secure archive system for paper if one was available, and a fifth says there are no rules and everyone just manages their own information as they see fit.



We can confidently predict paper is not going away in the near future and the paperless office is still an elusive dream for many businesses. Recent studies found that almost a third of business executives in mid-market companies believe that the paper free office will not be a reality in the near future. So how can paper be more accessible and useful?

Your business will face many challenges but the opportunities are greater.

When it comes to paper, the focus turns to the introduction of a scanning, or digitisation programme. The most successful digitisation programmes are those that are designed to meet a wider business objective, such as:

- Faster processes and accelerated access to information
- Reduce costs and increase the profitable use of office space
- Enable secure flexible working
- Harness the value of information
- Reduce risk & manage security

The desire to move from paper heavy to paper light often begins when the business decides to embrace digital technologies more generally across the organisation.

Research shows that customer service levels and response times could be improved by nearly a third if staff could immediately access customer and case-related information. Another study found that driving paper out of a process could quadruple response rates and boost staff productivity by a third. Yet more than a third of European executives feel they do not have the access to the customer information they need to provide strong levels of customer management. This is critical for improving customer service, such as speeding up the processing of insurance claims or being able to access in real-time a customer's entire history with the firm

The journey to paper light is not a straight line. Organisations start from different places and have different needs along the way. The information landscape changes so fast that there is also no fixed end point. The most important thing is to begin. To focus on the most important information or functions first (it is expensive and unnecessary to digitise everything and impractical to do everything at once) and ensure your employees are with you all the way. If staff don't understand or won't accept the change, it will not succeed. The scenarios overleaf illustrate the various stages an organisation goes through on its journey to paper light. One of these should resemble where your organisation is now. Having established that, you can draw on the steps outlined to define how you can best move from where you are to where you want to be.

FAST AND RELIABLE DISTRIBUTION

The Vineyard Group exists to serve customers who are interested in the finest wining, dining and accommodation. Customer service and impeccable presentation are the group's paramount concerns.

A challenge for the group was the handling of purchase invoices, they were delivered to the individual hotels but settled by the head-office in Newbury. Copies had to be sent by post, incurring a delay of at least one day. Instead of posting invoices, each hotel now use their ITQ MFPs to scan the documents and email them to head-office. The process is fast, reliable and far cheaper than the alternative.

Scan-to-email is far from revolutionary but it can be a complex process; staff might have been asked to type in email addresses, select a file format, scanning resolution, compression ratio and so on. ITQ simplified the process so staff could use single-button shortcuts to send documents to their regular destinations. The process became as simple as basic copying.

ITQ's scan-to-email system has been augmented with a network fax facility to route faxes to email inboxes. The combination of the two systems has accelerated invoice processing and allowed the group to offer the administrative service its customers and suppliers expect whilst reducing costs.



Where is your business today and how will your business achieve its objective?

Do you need:

Ability to process large volumes of incoming documents?
Improved access to information?
Increased control to meet compliance and audit needs?

Solution

Records Management
Secure Shredding
Scanning and Digitising Solutions



Do you need:

Improved access to information?
Ability to share records across different sites?
Increased control to meet compliance and audit needs?

Solution

Records Management
Active File Management
Scanning and Digitising Solutions
Document Workflow

Do you need:

Better security?
Reduced costs?
More storage space?
Improved access to information?

Solution

Records Management
Secure Shredding
Scanning and Digitising Solutions



Do you need:

Ability to harness the full value of information?

Solution

Scanning and Digitisation Solutions
Records Management
Document Workflow
Comprehensive Information Management Solutions



A MORE COMPLIANT WAY TO SCAN

The aerospace industry is dominated by one concern: safety. As a key supplier, Lufthansa Technik has to provide worksheets documenting all the work carried out on the landing gear it services. Each stage of the refurbishment process generates a new control sheet.

Once refurbished, each landing gear assembly will have developed a long paper trail that has to be scanned and sent to the customer. Lufthansa wanted to reduce the cost and delay of their existing scanning solution. The entire process was brought in-house using ITQ's MFPs and an AutoStore workflow. At a stroke, Lufthansa saved £100,000.

ITQ's system uses barcodes on the control sheets to collate them and store them according to the job and customer. Within minutes of a step being complete, the control sheet is posted to SharePoint for the customer to view. The process is almost entirely automatic. There is no need for staff to organise documents after scanning – the system does it for them based on the control sheet's barcode. There is no need for the documents to be forwarded to the customer - they are automatically posted to SharePoint.

ITQ's scanning solution has given Lufthansa a clear competitive advantage. Its customers are demanding ever faster turnaround on refurbishments. ITQ's document workflow allows it to exceed those requirements at a far lower cost than its competitors



**Lufthansa
Technik**

From heavy paper to big data

Does any of this sound familiar? You are surrounded by documents: on desks, in drawers and in filing cabinets. Every day the printers and photocopiers churn out more. All this paper is taking up valuable office space and leaving your information vulnerable to damage and loss. You probably store most of the information you no longer need somewhere on-site, where it could be insecure and exposed to environmental damage. You are no longer exactly sure what's in all those archived folders gathering dust and cobwebs in the basement, let alone what's floating around the workplace. If you need access to documents, it may take you days, if not weeks, to find the right records.

If this scenario resembles your workplace in any way, then your business could be putting itself at risk of data loss. The damage or exposure could lead to inefficiency and loss of competitive advantage and the business reputation. The damage could be far reaching and it could take your business years to recover, if at all. So it's time to take control and reduce the amount of paper in your workplace. A scanning and digitising solution can be a start leading to a professional records management programme that will not only reduce risk, but also provide faster access to information. The first thing to do to become paper light is to identify and collect all your 'inactive' paper - the documents you no longer need or use regularly - and move them somewhere secure, probably off site.

Accessing the "big data"

Organisations are starting to realise that their information contains wisdom and insight that can drive innovation and success; we call this "big data". The challenge for many firms is how to get their big data organised and structured in such a way that it becomes easy, or easier, to find and extract the business intelligence locked up within it. If you have got your scanning, records management and digitisation programmes in order you are well placed to search and analyse your information, harnessing the accumulated knowledge to enhance innovation, decision making and customer service.

Scanning and Digitising

Now it's time to transform how you handle 'live' documents across the business becoming paper light and accessing your big data. People keep information close to hand because they want to refer to it regularly or get to it quickly. According to AIIM, three quarters of companies claim that it's harder to find information they own than information they don't, yet many businesses find it difficult to implement standardised processes for indexing and accessing critical documents. Storing documents in cabinets and desks across the office isn't the best way to protect and access critical documents. You need to think of an alternative. This alternative is called digitisation, and it involves scanning into digital format the documents your employees most need or use. Smart document retrieval systems mean that information can then be retrieved instantly, used, shared and re-filed securely

Professional Records Management

You've made it this far, so now you can introduce added levels of sophistication. This includes adapting to the ever increasing volumes and formats of information coming in and ensuring data can feed directly into your latest automated processes or workflows. The legacy of your paper heavy days means that you probably still spend far too much time processing incoming information, creating bottlenecks in your workflows and slowing down response times to customers, partners and suppliers. The latest professional records management solutions, include inbound scanning, enable information to be extracted on arrival and injected straight into the relevant process. In addition secure storage and managed document scanning and retrieval systems help your business to remain legally compliant in the face of increasingly complex and stringent data legislation.

The route to paper light

Knowing where you are going means being clear about your business objectives. This matters because it allows you to better define your digitisation strategy and ensure you can extract maximum value from your information. Business goals that are impacted by paper light programmes include:

1. Faster processes and accelerated access to information
2. Reduced costs and more profitable use of office space
3. Secure flexible working schemes
4. Access to the full value of information
5. Reduced risk & enhanced security

Understand the business needs you want to solve through document digitisation

Digitisation helps to improve business process efficiency. For example, an insurance firm might want to review how its customer claims processes could be enhanced when paper free. As above, this also means working out who needs access to the data, when and how often. Could the firm need access to records while they are off site being scanned? Other factors to consider include security, the intuitiveness of information retrieval, format flexibility, compliance/evidentiary value and cost of scanning, storage and retrieval. With this in mind it is important to have metrics in place so you can measure the impact of digitisation on your business processes.

- Categorise information according to document type
- Prioritise valuable assets like intellectual property
- Understand your processes and how digitisation can improve them
- Know who needs to access the information, when and how often
- Have metrics in place to measure the impact of digitisation

Bring your people with you

If your employees don't understand or accept the changes, they will simply establish a work around that could leave information even more insecure. It is critical to engage staff in the process. You could set up a working group that includes key stakeholders as well as the end users; and ensure that the processes eventually implemented are impossible to bypass.

- Engage staff in every stage of the process
- Ensure that processes you implement are impossible to bypass
- Consider cost and the costs of doing nothing
- Identify the hidden costs of managing information in-house
- Scan only the documents that you need to access most

The importance of preparation

To ensure you don't lose any of your newly digitised information, it is important to plan and prepare before you get started. This includes determining meta-data: tags, labels and an index that will help you to quickly locate the digital document you need. Clean and group files before they get scanned and check them for legibility and accuracy.

- Record meta data like tags, labels and indexing
- Clean, group and check files for legibility and accuracy

Don't forget inbound

What about all the new paper that flows into your organisation every day? Managing inbound information will help you to improve the efficiency of your business processes and limit workflow bottlenecks. Many businesses struggle to manage this efficiently because information exists in different formats and is managed by different teams.

For example, if we consider a customer service process, a scanning solution would enable front line customer service agents to immediately pick up on prioritised and queued customer interactions, speeding up processes and enabling far better customer service. This approach will also help to reduce workload and thereby reduce cost. You need to know how and when your teams need access to information at different stages of your business process. The right information management strategy for your business should take into account your existing business process and give you better control of your information. Leading organisations consider the business processes that depend on inbound paper documents as well as archived paper records at the outset.

- Identify business processes that depend on incoming paper documents
- Use scanning to speed up customer service

Consider the cost

The full cost of managing information is often hidden and can be considerable. Expert help can identify inefficiencies, such as paying for storage that isn't needed or developing expensive systems that could be more easily, cost effectively and securely accessed through a third party. Costs can escalate rapidly if you try to do everything yourself, and try to do it all in one go. It is not necessary, for example, to scan all documents; it's more important to scan what you need and value most and to archive the rest. It is also worth remembering that for some processes, paper may work better.

Consider the potential of big data

The volume, variety and speed of information is increasing and few organisations will be unaffected by this. Your document management processes need to be able to accommodate these ever-growing volumes. Make your information challenge manageable by segmenting and prioritising the information you hold. Getting something in place is the most important – so opt for progress over perfection. Whatever you decide on, make sure that it includes a reliable, long term storage solution, and that you can extract and act on the insight into all that data.

- Segment and prioritise the information you hold
- Get a process in place as soon as possible

Know what is stored and where

There are many kinds of information, and each type has different storage and access needs. To decide what to store and where, you need to determine for each document type the confidentiality level and legal retention period. You need to decide who needs access to the document, and how often, and take particular steps to protect your most treasured and valuable business and commercial documents. These 'golden nuggets' include such things as research documents, intellectual property and customer information. Make sure everything is indexed so you can find it again easily and quickly.

Compliance and legal requirements

It is worth taking time to survey and understand the regulatory landscape and ensure that the latest regulatory requirements are built in from the outset.

Digital records are often held in the cloud or on a server at a data centre and it is important to know exactly where that is geographically, as data protection laws can vary across borders. Also, some types of information must be retained within the country of origin. Digital documents, including scanned paper documents, can now be presented as evidence in legal proceedings. However, to ensure admissibility, digital information must have been managed securely throughout its lifetime.

In the UK, the standard that specifies how electronic information has to be managed for maximum evidential weight in a court of law is *BS10008: 2008 – Legal Admissibility and Evidential Weight of Information Stored Electronically* (available to purchase from BSI at <http://shop.bsigroup.com/Browse-By-Subject/ICT/Legal-Admissibility/>). Other countries are introducing similar standards. Almost any document may need to be presented as evidence. So if you're thinking about replacing paper records with digitised documents, you need to ensure that the whole document lifecycle, from capture, through to transformation, storage and disposal, follows procedures that ensure legal admissibility. This is another area where a good records management provider can help you.

ABOUT ITQ

ITQ is a forward thinking and dynamic company providing high level support and exceptional levels of service. Established in 1991, we have evolved into a premier print solutions provider.

In 2011 our development and strength was recognised in the marketplace when we were selected to supply the BBC with one of largest and most prestigious print management contracts awarded in the UK.

For further information visit our website: www.imagethroughquality.com