

Going Paperless Best Practices Checklist

Planning

- ✓ Do think electronically in terms of file naming. When the PDF is retrieved at a later date, what will assist in making sure that users are efficient in finding what they are looking for?
- ✓ Do keep in mind that the way in which you roll out your system isn't the way it will look six months from now. Plan out a process and architecture that allows for scale and growth.
- ✓ Do reassess how documents are organized: by client, year, engagement, practice area, and other factors because it's much more difficult to redo than to do right.
- ✓ Do have an executive sponsor on the team or else your project is doomed to fail.
- ✓ Do set up an action plan to add legacy files, procedures, client information, etc.
- ✓ Do implement a solution that lets you search by various items, such as name, date, size, words in a document, and other factors. Retrieval of the documents is critical. Do evaluate whether you need a system to view documents while we searched without having to open the app.

Implementation

- ✓ Do prepare the firm for changes.
- ✓ Do start slow and in modules by function and department as necessary.
- ✓ Do mimic original paper documents when creating electronic forms and templates.
- ✓ Do make sure the system can support executive reports and user task lists and dashboards.

Communication

- ✓ Do communicate with employees throughout the process.
- ✓ Do make staff a part of the process from the very beginning.
- ✓ Do train staff on all hardware, software, and processes.
- ✓ Do more training than is necessary.
- ✓ Do rely on the scanned version. Too often firms that go paperless still rely on the paper version of documents.

Hardware / Software

- ✓ Do invest in technology, such as dual screens, scanners, flash drives, memory sticks, and other technology.
- ✓ Do use the right scanners.
- ✓ Do have a disaster recovery plan that is certified and secured by a third-party.

Integration

- ✓ Do make document management an interactive system, not an after-the-fact storage system.
- ✓ Do integrate other solutions and tools with the system.