

Paperless Best Practices

IT IS GOING GREEN

Almost any firm can go green -- green businesses improve their brand image, attract more new clients, see higher profits because of lower operating costs (utilities, waste disposal, etc.), and enjoy improved employee productivity, morale and retention. Green businesses also shield themselves from risks such as inflation in energy prices, increased insurance rates for companies that don't consider their carbon footprint, and shareholder or community activism.

A traditional office has historically consisted of paper-based filing systems, which have included filing cabinets, folders, shelves, compactuses, and offline storage systems, all of which take up considerable space, requiring maintenance and equipment.

The Future of Paperless includes GoGreen Initiatives, Web Based Virtual Office, Productivity Tools, Internal and External Online Sharing, Collaboration, Meeting, and Portals.

Think all of this is talk and media hype? The move to paperless and "remote" employees including auditors, work-at-home moms and dads, seasonal help, traveling employees and so on has been main stay for years.

DEFINITIONS

- ❑ Go Green Definition - Environmentalism is a broad philosophy and social movement centered on a concern for the conservation and improvement of the natural environment, both for its own sake as well as its importance to civilization.
- ❑ Paperless Definition - The "paperless office" is now considered to be a philosophy to work with minimal paper and convert all forms of documentation to a digital form. The ideal is driven by a number of motivators including productivity gains, costs savings, space saving, the need to share information and reduced environmental impact.
- ❑ Online or Web Office - "Online office" suites are offered by websites in the form of software as a service. They can be accessed online from any Internet-enabled device running any operating system. This allows people to work together worldwide and at any time, thereby leading to remote, web-based collaboration and virtual teamwork. Usually, the basic versions are offered for free and for more advanced versions one is required to pay a nominal subscription fee.

**DEFINITIONS VIA WIKIPEDIA*

Paperless Roadmap

It's as easy as 1, 2, 3:

1. Determine cost-benefit (economic justification) by function:
 1. Map manual, paper process vs. optimized process
 2. Assess the hardware, software, and tools cost – there are a plethora of consultants and providers that will help you fill out the cost-benefit calculator
 3. Assess your cost-savings
 4. Assess your internal value-added benefits
 5. Assess your customer and supplier value-added benefits
 6. Create roadmap for implementation in phases by function much like ERP
2. Create digital policies and procedures.
3. Identify technology and implement.

Go Green Paperless Checklist

- When planning, define value as more than financial.
- Comprehensively define your product or service's benefit not only to the customer, but to society and the environment.
- Don't preach, DO.
- Define the green benefits of your product or service in realistic, deliverable terms.
- Focus on customers that appreciate both the immediate, direct value and the ecological benefits of your greening.

Go Green Initiatives:

Which of these make sense and cents for your firm? (Check all that apply):

- Paperless initiatives
- Green payroll
- Recycling policies and practices
- Electronic and portal internal and/or external communications
- Energy efficient-lighting
- More efficient offices (leave a smaller carbon footprint)
- Reduced staff traveling
- Create "Go Green" Champion and or committee – i.e. look for ways to further conserve energy, and the initiation of awards to employees who come up with ideas
- Advise clients on how to do it, identifying cost and special tax savings, and help clients publicize their efforts

Creating the Right Mindset: Change Management Best Practice Advice

- **Everyone has to buy in.** Do employees want to join the anti-paper campaign? You really have to take employees through the process a little at a time. There's a learning curve — people have to understand how to use new software, some of which they haven't seen before, and learn to deal with a new environment.
- **Most firms can improve time and attendance (T&A), expense reports, billing, reporting, and more but take one small step at a time.**
- **Realize that a paperless office doesn't happen overnight.** Going paperless requires new processes and therefore people need to be trained on the new process. Start with one small area of your business such as invoicing, purchasing or sales contracts before attempting to go paperless across your entire company.
- **You'll need to rearrange your office — a good thing.** At some point during your transition to a paperless office, however, the difference in your physical storage space will become apparent.
- **"Paperless" often really means "less paper."**
- **Realize that less paper is just the beginning of the payoff.**
- **Do NOT Treat Paperless as an IT or Administrative Project.**

"Green," "environmental" and "sustainable" are more than just buzzwords when companies proactively find ways to improve their organization and their environment at the same time all benefit.