FROM PAPERLESS TO LESS PAPER:

TEN WAYS TO DIAL DOWN PAPER USAGE WITHOUT GOING COLD TURKEY

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TEN WAYS TO DIAL DOWN PAPER USAGE

"Paperless" can be a scary word for those of us who grew up around printed binders, spreasheets, and reports. So perhaps it's not surprising when workers push back against the drive toward a paperless workplace.
The idea of going 100% paperless can be unsettling, and frankly, it's unattainable for most firms.

It's often better to banish the word "paperless" and instead adopt a strategy of "less paper." You'll likely get the same productivity gains with a lot less angst. And "less paper" is a more accurate description of the gradual process that takes place at most firms. Here are a few suggestions that may help you on your journey to greater efficiency.

1. **Start scanning up front**—If you scan paper documents at the end of the process, you're missing out on most of the productivity gains of an electronic workflow. Scanning up front requires you to make more changes to your processes, but it unlocks the potential for huge productivity gains. You'll be able to make documents viewable by any staff member at any time, take advantage of online review tools, and much more.

2. **Implement electronic routing**—Many firms stick with paper because they can't imagine giving up the paper routing sheet on each document folder. The truth is, there are a variety of electronic routing options that work much better. They offer the certainty of a paper routing sheet without the hassle of physically moving documents around the office or hunting down a missing folder.

3. **Add more monitors**—Another attractive quality of paper is that it's possible to look at many documents at once when they're spread across your desk. You can do the same thing with electronic documents by adding multiple monitors. Monitors are cheaper and far less bulky than they used to be, and studies show that a second monitor can dramatically increase productivity. In fact, many firms have found that they're most productive with as many as five monitors at some workstations. Once you try it, you'll never want to work with a single monitor again.

4. **Discourage printing**—This one sounds obvious, but it's one of the most effective ways to reduce costs and increase efficiency. Adding more monitors will discourage printing, and simply asking employees not to make unnecessary printouts will help as well. Keeping a running tally of how much paper and toner they're saving can be a great motivator.

5. **Articulate the benefits and track progress**—The most effective way to rally support for a less paper strategy is to clearly articulate and quantify the benefits your firm expects to achieve, then report your progress to stakeholders. For example, paper and toner usage are easy to measure and report. Other metrics, like time savings, can be more difficult to quantify. But it's often possible to document overall time savings on engagements or tax processing, then tie those improvements to your less paper strategy.

6. **Appoint a process champion within the firm**—One of the best ways to ensure success is to put a single person in charge of implementation. This person will be responsible for answering questions about the process as well as tracking and reporting the realized benefits and progress toward objectives. The process champion role can be an opportunity for a high performing staff person to take a visible role in firm administration.

7. **Map out your firm processes and plan how to perform each step electronically**— Just about everything is easier to do electronically, but sometimes it takes a little planning to work out exactly how you'll get the job done. So it's a good idea to map out the typical flow of documents within the firm, from initial customer data collection to final archiving. Mapping out the process will highlight inefficiencies that you can eliminate in your new electronic process.

8. **Develop document management standards**—A little additional planning in the design phase of your document management process can save lots of time going forward. File naming, storage locations, and which documents to retain are some of the policies that should be set as early as possible to streamline operations and improve consistency going forward.

9. **Streamline your records retention policy**—The conversion to electronic recordkeeping is a great opportunity to implement a clear, well thought-out retention policy and make sure your employees follow it. Automated management tools make maintaining electronic files much easier than managing a physical file room, but they do require you to define clear-cut rules. For guidance on creating a retention policy that adheres to all compliance requirements, see Chapter 3 of *PPC's* Guide to Dealing with the IRS.

10. **Choose your document management software carefully**—There are many document management options out there, ranging from a simple folder structure on a local hard drive to hosted, feature-rich cloud solutions. It's important to choose one that has all the features and functionality you need. Inexpensive, bare-bones solutions may seem attractive during the planning stage, but remember that document management software is the heart of your entire operation. Even if the best solution costs a little more, it will pay you back day after day, year after year.

LET'S GET STARTED

When you're ready to start down the road to less paper and more productivity, we offer a variety of helpful resources to guide you through the process. If you're not sure where to start, our sales team would be pleased to map out some next steps for your firm.
Email **CS.Sales@ThomsonReuters.com** or call **800.968.8900** to get started.