

10 WAYS TO REDUCE PAPER USAGE WITHOUT GOING COLD TURKEY

“Paperless” can be a scary word for those of you who grew up around printed binders, spreadsheets and reports. So perhaps, it’s not surprising when workers of all kinds 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 many 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

An attractive quality of paper is that it is possible to look at many documents at once when they are 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 are most productive with as many as five monitors at some workstations. Once you try it, you will 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 business 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 are 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. Paper and toner usage are easy to measure and report. Other metrics, like time saving, can be more difficult to quantify. However, it’s often possible to document overall time savings on engagements or tax process 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 the firm’s 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 document to retain are some of the policies that should be set as early as possible to streamline 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 the CRA’s compliance requirements, visit <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/kprc/wh-eng.html>. Guidance on creating a retention policy that adheres to the RQ’s compliance requirements is available here in French only <http://www.revenuquebec.ca/fr/entreprises/impots/societes/declaration/conservationregistres.aspx>

10 CHOOSE YOUR DOCUMENT MANAGEMENT SOFTWARE CAREFULLY

There are many document management options out there, ranging from a simple folder, to a feature-rich desktop or cloud solution. It is 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 well into the future that your document management software will store and present the documents on which your business depends every day. Even if the best solution costs a little more, it will pay you back day after day, year after year.

When you are 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 are unsure where to start, our sales team would be pleased to map out some next steps for your firm.

dt.sales@ThomsonReuters.com
or call us at **1 866 653-8629**



THOMSON REUTERS