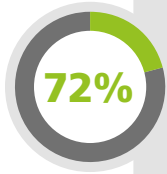RICOH
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7 Tips to Going Paperless

Managing content is among the top challenges affecting businesses today, leading to losses in productivity and rising costs if it's not taken seriously.

72%

72% of IT decision-makers said that digital document processes allow their organisations to better maintain business continuity despite unforeseen circumstances

Forrester, 2020

While businesses have been improving operational efficiency via digitisation in the past couple of decades, the seismic shift towards remote working because of COVID-19, has forced companies to speed up their digital transformation initiatives to stay competitive.

This step-by-step guide outlines key strategies for businesses to move toward a paperless environment without losing valuable information, all with deployment flexibility for any IT ecosystem.

Seven Steps Toward a Paperless Office

It's been over 50 years since the term 'paperless office' was coined to describe how computers and technology would transform the workplace.

While completely eliminating paper may not be practical, smart technology, hardware and software can empower your business to boost productivity and reduce cost—and at the same time be more environmentally sustainable.

Here's how you can get closer to a paperless office:

1

Take stock

The first step is to get an understanding of how your business is using paper:

- How and where is it coming into your business?
- How much is created internally through printing or copying?
- Is it created electronically and then printed out as part of a manual process?
- Which processes are dependent on paper?
- Where is it stored?
- What are the internal costs for printing and storage?

Then, work out how paper-based processes are costing your business:

- Time wasted searching for documents that are misplaced or lost.
- The cost of reprinting lost documents.
- Poor customer experience due to long wait times and response delays.
- Poor work experience caused by tedious, repetitive, and counterproductive tasks.

Establishing a baseline from the above data helps you to identify quick wins, as you work towards digitisation and evaluate your progress against your business goals.

2

Intelligent capture

Most organisations scan their documents in an ad-hoc manner. Only when most of the paper-based transactions are completed, are they compiled and stored digitally.

Introducing an intelligent capture solution as a permanent step in your processes now can help eliminate time-consuming batch-scanning cycles later.

Once you identify the processes that need intelligent capture, you can easily implement it using current technology and a well-managed change management initiative to spur user adoption.

Early-stage adoption can be via the capture of paper documents using scanners or multifunction printers.

Businesses can unlock substantial cost savings and benefits when they add intelligent capture solutions that convert paper documents to PDF, or other formats like Word, and route them to a cloud repository, database, or email address.

If your business requirements are more complex, intelligent capture solutions can extract data from a paper document, allowing that data to be verified, converted into an electronic document to be digitally authorised, and sent to one or more destinations.

3

Central content repository

Businesses should ideally have one or more central repositories, such as SharePoint Online, for their digital documents.

The use or success of the central repository is normally dependent on two major factors:

1   **Where, how, and which employees need to search and retrieve digital documents**

2   **Is the content repository set up with these requirements in mind**

Once properly configured to match employee needs and document workflow requirements, a central repository can do wonders for a company with a hybrid work environment, empowering it to:

- Deliver better customer service
- Get more done faster
- Adapt to remote working
- Lower document storage costs
- Increase document security
- Increase document accessibility
- Achieve scalability and empower integrations
- Support business continuity
- Keep employees engaged.

4

'Outside-the-box" creative hardware solutions

Employees often print documents for reference or comparison purposes. Setting up dual monitors can reduce printing and paper build-up by allowing comparison to be done on screen. Research also suggests that dual monitors increase productivity and provide ergonomic benefits.

Introducing creative and novel solutions like this, while not directly recognised as a 'paperless solution', can help reduce paper use as well.

5

eForms

The days of filling in forms with pen or pencil aren't over, but they're certainly numbered. eForms for your employees and customers is a smart way to reduce paper, duplicated work, and data entry costs.

But the real value isn't just in the costs you save, it's the seamless experience you can offer your employees and customers. Furthermore, the data from eForms can be automatically ingested into a database or application, transferred to existing processes or workflows, or used to build reports. This saves your business both time and money.

6

Understand regulations and compliance

To comply with regulatory and compliance requirements, you must:

1 **Be aware of which records you are required by law to retain in physical form.**

2 **Review internal business policies on retaining paper receipts and records.**

When it comes to managing digital records in place of paper, businesses need to ensure that they are following legal requirements. It is important to have a policy in place that outlines how digital records will be managed and ensure that scanned or electronic documents are treated as originals for legal proceedings. For example, the Australian Taxation Office (ATO) accepts digital (scanned) copies of receipts for BAS, tax returns, audits, or other reporting requirements. This allows businesses to go paperless without any worries.

7

eSignatures

eSignature solutions offer a way to reduce the amount of paper used in a business. Not only does this save time, but it also creates a more secure document trail. An eSignature solution that integrates with your content repository allows you to keep all your documents in one place and enables you to sign them electronically. With tamper-proof security features, you can ensure your documents are secure and compliant with government regulations.

Dreaming of a Paperless Office?

Creating a paperless office—or reducing the use of paper—can't happen overnight and isn't a once-off project. It's an ongoing process that requires commitment and creating a new workplace culture that embraces change for the better.

Changes should also only be made if they improve the current situation. If you find that some of your paper-based processes are still relevant, you can continue. You can find ways to introduce smaller changes that will reduce, if not eliminate, paper use in your business.

Learn more about how
Ricoh's Workflow & Automation
solutions can help transform and
simplify your business processes for
future readiness.

About RICOH

Ricoh is a leading provider of digital services, process automation, and information management solutions designed to support digital transformation and optimise business performance. Backed by an 85-year history of cultivating knowledge and nurturing organisational capabilities, Ricoh empowers the creation of digital workplaces utilising innovative partners and technologies, providing the expertise and services that enable individuals to work smarter from anywhere.

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