



Becoming the Paperless Office

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K.J. McCorry, an efficiency and productivity expert, discusses on how offices can reduce paper and begin "paperless" initiatives in their office.

For more than 10 years we have heard that the "paperless" office is just around the corner; alas, paper consumption has tripled in the last decade. Every year, the United States uses nearly 3.7 million tons of copy paper — more than 700 billion sheets! The Information Age has not reduced our paper pile up; instead, we print data more quickly and easily. Most documents received via email are printed, creating a paper nightmare for the recipient. A Xerox survey showed that most U.S. office workers print more than 1,000 pages a month; the national annual average is 10,000-12,000 sheets per worker.

For a company to have a paperless office is more complex than it seems. There are issues of technology, management change, how people process data, and work practices to consider. Along with reducing paper usage, companies must be clear that the value of becoming "paperless" will support business objectives, operations, and sustainability goals.

Why Become a Paperless Office?

There is a clear environmental need for paperless offices. The paper industry is one of the world's major polluting industries and one of the largest contributors to greenhouse gases with over 900 million trees cut down annually. The EPA reports that paper is the number-one material thrown away, comprising 40% of our waste stream. According to the National Resources Defense Council, "The pulp and paper industry may contribute to more global and local environmental problems than any other industry in the world."

In addition to environmental impacts, paper is time consuming to manage. Record keeping constitutes more than 90% of all office activity. Studies indicate that of the paper filed, over 80% is never referenced again! One Xerox study showed that over 45% of the office paper that is discarded was thrown out on the day it was printed. A great deal of time is being wasted printing, sorting, purging, and filing paper.

Then there is the cost aspect of paper. According to the Association for Information and Image Management, the lifecycle cost of a document is over \$20, which includes the cost of paper, printing, mailing, distribution, and handling fees. Another study done by Coopers and Lybrand estimated the cost of paper management to be about \$50 per document.

Essentially becoming a paperless office could reap the benefits of improved efficiency and effectiveness, reduce cost, and improve the brand and image of the company by becoming a better corporate environmental steward.

It's Not So Easy Being Green

There are difficulties in becoming a paperless office. Employees who graduated from high school or college without the use of a computer grew up learning and processing information in paper format. It can be difficult and uncomfortable for these generations to process, read, comprehend, and absorb information on the computer. In their research for the book, *The Myth of the Paperless Office*, Abigail Sellen and Richard Harper discovered that these employees depend on paper to conduct their daily tasks, even though a digital version is available. For instance, when editing a document on screen, 89% of the time workers simultaneously use paper, spreading around their computers printouts of other supporting documents they are using.

Then there is the issue of data loss. Most employees don't understand IT backup or disaster recovery processes. Citing past experiences with data loss, many employees continue to keep data in paper format for security and historical purposes. These concerns are not unfounded. According to RBS, Inc., 31% of PC users have lost all of their files due to events beyond their control. Gartner Research found that over 77% of organizations don't have disaster recovery or business continuity plans, and the ones that do are often outdated or never communicated to employees. In a different study it was found that 34% of companies fail to test their backups, and of those that do, 77% have found backup failures.

Although there are other constraints and issues of becoming a paperless office, data protection and data process are key issues to address when becoming a paperless office.

Four Steps to a Paperless Office

1. *Create a Document Management System and Guidelines*

This important step means creating a simple way to manage electronic data. An office needs a system of sharing data: 1) use a hard-drive server or 2) install document management software. Either way, data management guidelines and structure need to be established. Employees must have a logical file structure with clear guidelines including record retention and parameters of how, where, and for how long data should be stored. Keep in mind that legal, financial, and HR departments must abide by clear government retention guidelines on data management.

2. *Improve Printer Efficiency*

Employees who print their electronic data create their own paper pile up. The easier and more convenient it is to print, the more likely it is that paper use will increase. One way to reduce paper use is to remove individual and desktop printers. By making printing less convenient, employees begin to be more mindful before printing their data.

IT departments can also increase printer efficiency by changing defaults on copying machines to two-sided copies. Known as “automatic duplexing,” the copier turns the paper over and prints on the backside automatically. One year after implementing this copier default, Bank of America reduced paper use by 50%, which saved \$1 million in total paper and printing costs.

Users also print data because they are not sure how to save data in another easily retrievable electronic format. Install PDF printer drivers on employee computers. The PDF format can be recognized and made accessible on all computers and to all users regardless of the source software. This enables workers to save emails, Internet pages, and other system data into a standard PDF format.

Installing print management software is another option to improve printer efficiency. Print management software sets restrictions on printing and directs users toward the most efficient and cost-effective printer in the office. Moreover, the software collects all the printing data for analysis so that there is good information about how much is printed and wasted on a daily, weekly, and annual basis.

3. *Provide Technology Options*

An easy and convenient method to scan documents makes it so workers can scan and email documents instead of making multiple paper copies. Scanning important paper documents, such as company historical documents, into an electronic format makes for simplified electronic filing and retrieval. Scanning also works well for paper files that are compiled from various sources that need to be saved as one document in one place.

Faxing is still alive and well as a medium to transmit data. According to Gartner Research, more than 1 billion faxes are transmitted annually worldwide. Offer employees a way to have faxes converted to an email or an electronic format instead of paper.

When processing data, workers often need to view documents simultaneously, as Sellen and Harper found in their research. Provide employees with the option of having a second monitor. When workers have the flexibility of seeing two windows or two screens at one time, they can review one document while processing or taking notes on another, alleviating the need to print hard copy documents in order to have the same functionality.

4. *Automate Processes*

Improving paper efficiency means accomplishing the same task using less paper. Determine which paper-based processes are inefficient and could be improved with automation. Of course, when some processes are automated they become more costly and time consuming; therefore, stay focused on the processes that are vital and used frequently. Automation is a good investment only if it lowers costs, reduces time, and improves efficiency and effectiveness of business operations. The key is to have the right balance.

Engage Your Employees in the Process

When companies begin their “paperless” initiatives, they must remember to consider the change employees will face. As much as workers hate paper, they also love it! Not only do you need to provide IT systems, tools, and policies, but also it is important to create the paperless culture within your firm. Organizations must inform and engage their staff in the value of becoming paperless so each member will buy into the goal and purpose.

Next, it is important to understand your company’s unique paperless challenges. Support and encourage the paperless change by letting employees, alongside IT staff or consultants, work through these challenges to come up with solutions. Once solutions are identified, be sure management supports these initiatives and provides the necessary resources to implement the new processes.

K.J. McCorry is the owner of Officiency Enterprises, Inc., which provides productivity and sustainability consulting services. She is also the author of Organize Your Work Day In No Time (Que Publishing, 2005), available in a [print edition](#), as a [downloadable eBook](#), and in [Safari Books Online](#). She is currently working on her second book, The Paperless Office, expected for release in 2009. Ms. McCorry

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