



Optimized Offices
2879 Hwy. 160 West #4325
Fort Mill, SC 29708
T 803-547-5323
barbara.ivey@optimizedoffices.com
www.optimizedoffices.com
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Less Paper for a Small Business – Case Study

Challenge

Optimized Offices was approached by a small Management Company with a big problem. It was buried in paper. It managed fifteen different companies from a home office. Each company received monthly bank statements, brokerage reports, and correspondence. The home office had run out of space to file the paper, and the Management Company staff had run out of time to hunt for documents they needed.

The President, Marjorie, dreamed of an office where all these documents could be stored on her computer, and found when they were needed. Marjorie turned to Optimized Offices to make that dream a reality.

Solution

There are three key components to a successful paperless office solution. The first is workflow. An appropriate solution addresses how documents are brought in, processed, stored and retrieved - and how users are trained to work with the system. The second component is company operations. The solution must reflect and support the way the company does business as well as legal, fiscal and regulatory requirements. The third component is technology – the solution must provide storage, backup and software that the new systems can rely on with confidence.

The successful solution team brings together subject matter experts in all three areas to work with company staff from the very start. In this case the solutions team included Optimized Offices advising on workflow; the company Accountant advising on company operations and requirements; a trusted IT Consultant advising on hardware, software, storage and backup requirements; and the Management Company team providing user requirements and preferences.

After an initial technology review, the decision was made to upgrade the desktop PC, update the data backup process, add a small desktop scanner and acquire software to create .pdf documents. This will prepare the team to store all new documents electronically.

Once the workflow assessment was complete, the next phase was to organize the electronic document storage in a way that made sense to all users. With fifteen companies to manage, an electronic filing system with a high degree of similarity from one company to the next adds speed and confidence to document storage and retrieval. All existing spreadsheets and electronic documents were reviewed one by one, and either destroyed, archived or added to the new filing system. Training documentation and system maintenance policies were created for the users. The Accountant was critical to the team, providing valuable guidance on document retention and disposition requirements.

Next came a review of the existing paper files. Some needed to be digitized and added to the electronic system. These included articles of incorporation, corporate minutes, among others. Marjorie prefers that this scanning be handled “in-house”, so a summer intern will take on the project. Another approach is to have a document scanning company manage the conversion. The decision was made to retain the other historical documents in paper. Paper is a familiar and low cost solution, even when offsite storage is utilized.

Result

The workflow, organization, training and maintenance plans were in place on the first day of the fiscal year. Marjorie is thrilled with the clarity and control the system provides. The stress level is much lower now that she knows where to find critical documents when she needs them. The training documentation is coming in handy as the Accounts Payable Administrator will take maternity leave soon!

Are you ready to work with less paper? Here are five things to consider...

1. Are there industry or government regulations that govern how your business records must be kept?
2. What process brings the most paper into your business?
3. How often do you refer to your paper files?
4. Is there a time (completed sale, project close, etc.) when paper could be scanned and saved electronically?
5. Is your workflow established, or is it in the process of being defined or re-defined?

FREE ASSESSMENT

Are you interested in a business system that is less paper dependent? Optimized Offices provides systems, habits and skills that equip busy professionals and companies for success. Contact Barbara Ivey at Optimized Offices to schedule a free assessment. 803-547-5323 or Barbara.Ivey@OptimizedOffices.com

