

The decision to migrate from a paper-based operation to a paperless office can be scary for many. It means having to phase out that clunky but familiar paper filing system and replacing it with a sleek and new electronic [file management system](#).

What are we in for? Where do we start? How should we organize our computer [filing system](#)? How will we search and retrieve our files? These are just a few of the many questions that can result in many a sleepless night for decision-makers and support staff in anticipation of the cataclysmic event. Here are some tips to not only ensure your survival but also to ensure your glorious success in this supposedly insurmountable challenge:

1. Use the “how to eat the elephant” strategy – i.e. take just one small bite at a time (apologies! vegetarians).
As is always the case, any new undertaking can appear to be extremely overwhelming if it is viewed as a whole. Therefore the project should be divided into manageable morsels. You do not have to deploy every department or business unit at the same time. Start with the easiest and make sure it is a success and then proceed to the next. Make the departments in-waiting impressed with the smooth execution and anxious to also benefit from the anticipated productivity.

2. Just keep a cool head, plan-plan-plan and everything will work out.

To get somewhere new you need to be cognoscente of where you are presently. Hopefully, you already have a functional paper filing system so use it as baseline reference to enable you to plan the structure your new computer filing system but do not let it restrain you. Realize that in addition to the concept of folders you also have the ability to tag each file with a precise file name that if properly structured; you and everyone else will be able to search, identify and retrieve any file instantly.

3. Don't do it alone. The more the team can get involved the more likely your project will succeed.

When a project is properly planned it is sometimes tempting to go at it solo but because the resulting impact affects other participants, it would be wise to get everyone involved with the process in some capacity. The reasons are not just to share the workload and get input from various stake-holders; there is also a critical psychological component.

4. Don't just do it - do it right. Institute best practice policies.

The reality is that just about any business that has a paper filing system is also working with computer files but perhaps with little or no control in the electronic filing practices. The results can be unpredictable because there is no conformity or standard policy. At some point management needs to draw the line and dictate that hereinafter “we will file our electronic files using best practices and as per our newly established departmental file storage and [file naming convention](#)”.

5. Slowly phase out the old but quickly phase in the new.

One of most common mistakes that is made when going paperless is insisting on getting rid of all the old paper filing system on day one. Absolutely not! Be prepared to hold onto your existing paper systems for awhile. What is more crucial is that from day one you must start converting your paper into digital files by scanning all the incoming paper documents. The most current documents are always the highest priority because these are the ones that everyone will needs to immediately access. The old paper files can eventually be digitized in order of importance and as background activity as time allows.

6. Get everyone on track with training.

Although many of the stake-holders might have participated in the development of the new computer filing process, it is highly recommended that all participants benefit from a formal training session prior to official deployment. It is a small investment but it is an opportunity to relieve any last minute anxieties or reluctances that could negatively affect successful deployment. The training would focus mostly on the filing activities; however, the searching, identification and retrieval of files is just as important because that is where the rewards in productivity can truly be appreciated and realized by all involved.

7. Monitor and manage.

Once the new computer filing system is in place; it is extremely important to monitor the results from the start. This would ensure that everyone is adhering to the newly established computer file naming conventions or policies. It is best to catch and correct bad habits early-on because the new filing system would be compromised and ultimately become less effectual. It is human nature to sometimes take shortcuts or break rules without necessarily appreciating the impact. Therefore the responsibility of monitoring and managing the process has to be there from the beginning and ongoing.

8. Let technology do the work for you.

Unlike paper filing and paper-file retrieval where the process is entirely manual and arduous, computer filing can be partly automated in many respects therefore making everyone's life easier. There are file storage and [file naming system](#) software applications that could eliminate the headaches in file management process. Once you have decided on your storage hierarchy and file naming conventions for your various business activities, such tools can automate some of the process by enforcing the rules for both storage and file naming. This would greatly reduce the file naming effort and minimize most of the essential filing system monitoring and management activities. The reason is that these tools do not let you save the file unless you are adhering to the pre-established rules or policies. They also have the added benefit that they come with advanced search capabilities that will let you search for any computer file regardless of how or when it was named or saved.

No matter the project there is always potential for minor hiccups but these are quickly forgotten after your paperless office deployment project has been successfully realized thanks to the execution of your well planned (*no doubt*) computer filing system. Just remember to not get intimidated by the anticipated challenges because the productivity gain and ultimate profitability of your organization is just too important and well worth the effort.

About the author: Vincent Santaguida is president of MultiCIM Technologies Inc., a business process automation and software development firm he founded in 1986. He was the driving force and principal architect for eXadox, a computer filing system that was conceived to simplify the transition from paper filing to paperless office filing. His written contributions include articles and [white papers on semi-automated structured file naming](#) as a strategy for better file management.