TRANSITION TO A PAPERLESS OFFICE...

A paperless office is no longer the "way of the future", a paperless office is NOW.

The list of benefits is huge:

- Removal of filing cabinets
- Removal of messy paper files
- Removal of the need to get up from your desk and go looking every time you need info
- Removal of your team creating piles of papers to "file later" and either never getting back to doing it or losing documents
- The ability to access information from ANYWHERE – out of office or after hours
- Better for the environment
- Huge savings on printer and paper costs
- Savings on server costs
- Digital processes saving hours every week (Time is money!)
- Ease of record keeping (digital) and searchability
- Concise and clear records accessible when required for compliance audits, presentation to authorities etc

There are a few different levels of paperless, some businesses just want to remove the manual storage of documents, others want to go to the next level of moving many of their processes to digital and electronic issue and receipt of documents also.

Please note- different businesses may be governed by some state requirements so it is important to check the legislation relevant to your state.

STEPS

Confirm state requirements – not just for digital storage but also for delivery/receipt of electronic notices/contracts/agreements.

Assess and confirm which areas you plan to implement paperless.

If you are not already – you need to move to Cloud based programs, there are a variety out there and we not laying claim as to which one is best (this will vary depending on an individual office needs) however a move to the cloud is a must. There are a variety of programs that do this for you and again it will depend which one suits you. For a discussion around which program will suit your individual requirements please feel free to give us a call, we prefer to discuss individual requirements before recommending systems.

Essentially you require cloud-based systems that will allow you to move your paper operational, sales and rental files to the cloud.

Assess your chosen programs to ascertain what storage capabilities you have per dept. EG – We find many offices are using PROPERTYME (a great cloud-based system) this has excellent document storage in the cloud, yet many businesses are still operating duplicate folders in Google drive, drop box and other programs that they do not need. Double handling and a waste of time. Your PM cloud-based software should have all the capabilities you need – if it doesn't, you're using the wrong one! The good programs will allow you to save EVERYTHING relevant to a PM file in the same program and simply mark it as "viewable to client" or "hidden from client".   Give clients access to their information (e.g. statements, leases etc) and watch the time-wasting calls into your PM's drop by half!!

Transfer of existing files to the cloud. This is time consuming, but required (in PM especially). Scan, drag, drop, save – (again depending on your program). If you don't have junior team members to power through this for you, one option is to introduce a file audit program for a period of time. EG. Set PM's a KPI of 20 file audits a month – which involves checking files are complete, and whilst doing so scanning and saving into system.

Most important – Create a set process that works for your individual office to ensure all NEW business and NEW files are automatically created in the cloud. Make it as user friendly as possible to follow as you can, the best way to ensure something becomes a standard step is to make it as user friendly as possible. Also make it a non-negotiable – Tip: remove the stationary for new paper files!

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One of the biggest issues you will face in this transition is your team members, you are trying to break the habits of a lifetime so it will require consistency in the message, reminders and a non-negotiable stance that this is happening! Make the processes as easy as you can, it's super hard to enforce change when the resistant people encounter speed humps and issues in a new process, this then becomes their (often vocal) excuse as to why "this won't work".

Once your digital files are created, you need to be constantly reminding – ask the question "why are you printing that?" – Encourage the drag and drop system with everything – NO MORE PRINTING!! SIDE NOTE – the amount of offices still printing application forms is mind boggling – STOP.

Set a cut-off date for when the existing cabinets/files will be removed. Reminders often, and stick to the date – make it happen.

Transition to electronic authorities, contracts, leases, condition reports etc is a HUGE time saver (again check requirements in your state). There are a variety of programs that do this for you and again it will depend which one suits you. For a discussion around which program will suit your individual requirements please feel free to contact us, we prefer to discuss individual requirements before recommending systems. Not only is electronic a time saver, it will reduce D.O.M, speed up signing times, assist in locking a deal down quickly, remove the issue of distance, and also mean you will have a digital copy on file EVERYTIME. Document is returned electronically and you simply save it. *Have you ever posted a tenant a new lease renewal which they have not signed, landlord decides a month or so later to sell and suddenly the tenant returns the late signed lease?

Removal of paper tick sheets on files – Electronic processes and checklists are of huge benefit. As each step is completed these systems will automatically prompt the next person required that they need to do their step, they also won't let people skip ahead and overlook steps, you can't move to the next stage until the first stage is completed. They are also great for tracking team projects. They also allow you to see the status of things from the cloud so from wherever you are, you don't need to drive into the office and look at a file or tick sheet when you need to know where something is up to! Again, there are a variety of programs for this – and individual office needs will vary – we prefer to discuss individual requirements before recommending systems.

Admin, staff files, compliance and operational documents. Again, state requirements may vary regarding what you are required to hold original copies of however most states are now moving toward digital copies of staffing docs being acceptable. This one is simply a matter of choosing a system in the cloud and creating your staff folders and operational folders and saving accordingly. The ease of access offsite or when being audited is so valuable, also the ability to maintain up to date records at all times.

All your team induction procedure, ongoing information, processes, policy and procedure manual etc – this should all be in the cloud and accessible by your team electronically at all times. The most common issue is team members printing out documents, then months later you make updates, and your team are still accessing old copies – RISKY. For more detailed information around this refer to our article on Cloud based Policies and Procedures also on this page.

TIPS:
Don't forget to set ARCHIVING PROCESSES also, you don't want a huge amount of messy data in the cloud. Clearly labelled digital folders, easily mapped and accessed AND an archive folder in each department to move things to once they are no longer active files.

Set clear rules around labeling of documents to ensure ease of use by everyone.

Place reminders around the office and in meetings to ensure the project is followed through.

We understand the information above is somewhat broad, however all businesses vary slightly in their needs and a cookie cutter approach never gets the best result.
Individual and customized advice will always generate best outcomes.

We are hopeful that the above guide is of assistance to you, however should you have any questions please do feel free to contact us and discuss your business in detail.

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