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mobile work environment

Mobile Forms
10 Surprising Benefits of "Going Paperless"

Table of Contents

Paper, Paper and More Paper...

Paper forms are still the dominant method used to collect information from workers in "the field." According to a study conducted by the Aberdeen Group in 2012, the volume of paper forms and unstructured data is growing at more than 30% per year. To put that in more tangible terms, the average American worker uses an amazing 10,000 sheets of paper annually. In fact, the US consumes over 800 lbs of paper per person a year and most small and midsize companies still equip their mobile workers with clipboards and paper forms. Last year, over half of companies (57%) with inspection and field service functions reported that they are currently using paper forms, while the rest use laptop applications or browser-based forms.[1]

By workers in the field, we are not talking about those who are adopting the newest trends in technology towards "mobility," or about the general workforce becoming increasingly mobile and untethered from the traditional four walls. Although it is true that that many business managers and other workers are so connected to their work through these devices that their physical location becomes unimportant, in this article we are talking about mobile workers whose jobs require them to move from one location to another. This portion of the workforce has always been mobile – driving around to from one work area to another, performing a wide range of activities such as outside sales, field service, construction and safety and equipment inspections.

Every business owner falling into that 57% still using paper forms knows that it is an outdated, inefficient and costly way to run their business – they all want to "go paperless." Yet paper still dominates, whether by choice, need, or just reluctance to give up the comfort gained by being able to hold onto something. This drive to go paperless which began in the 1980s is still alive and yet still in its infancy.[2] And cutting the use of paper goes hand-in-hand with the continued effort to streamline operations, increase efficiency and establish better control over information.

Gaining user acceptance and moving away from traditional ways to manage business processes is the real battle. Organizations still wrestle with the "paper crunch" that tends to choke business processes and fill physical storage areas where costs for space and administration are rapidly rising. So it's not that companies don't realize the inefficiency of using paper forms, but the cost and complexity of implementing mobile forms seem too high a barrier for most.[3]

In this article we will address why there's a continued reliance on paper forms, why it's bad for business, some easy first steps towards reducing paper in business processes through the use of mobile forms – and why your customers will thank you.

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The Staggering Risks of Relying on Paper

According to the companies surveyed by the Aberdeen Group, the problem with all of this paper is that it costs too much (29%), takes too long to process (39%) and is growing too fast (29%).[4] And the costs and inefficiencies don't stop after creating a paper form is created. Harvey Spencer Associates reports that businesses worldwide spend over $30B annually capturing information on paper forms. Other facts from that report also shed some light on why the costs of paper forms is so high:

- Forms are copied an average of 9-11 times
- The average cost to file a form is $20
- A four-drawer filing cabinet holds about 12K documents
- It takes one employee to maintain every 12 file cabinets

The costs of paper grow exponentially when forms are misfiled or lost: including time spent searching, recreating, and redistributing forms, misfiled forms cost businesses an average of $125 per form. And lost forms cost $350-$700. These costs are even more staggering when you consider that large organizations lose a document every 12 seconds.[5]

> **" ...business management analysts estimate that 70% of businesses would fail in three weeks if they experienced a catastrophic loss of their paper-based records. "**

And perhaps the most alarming finding of all: business management analysts estimate that 70% of businesses would fail in three weeks if they experienced a catastrophic loss of their paper-based records. It's no wonder that businesses want to move to a paperless environment. So what's preventing them from breaking this costly reliance on paper?

Four Barriers to Adoption of Mobile Forms

Despite the compelling reasons for reducing paper forms in favor of mobile forms, organizations are not making much progress – especially small to mid-sized companies. Research finds that 47% of organizations have made only 5% progress towards updating processes that could be paper-free. Worse, 19% said they had actually increased the use of paper.

For many organizations, converting from paper-based to paperless forms can be intimidating. Without a clear path idea about where to begin, many small to mid-sized businesses do nothing, perpetuating the paper-intensive workplace. This lack of confidence often stems from either assumed or actual workplace issues about how to move to paper-free processes. But many times, it's a case of not knowing where to start – paper forms, inbound documents, paper in the process, outbound printing – or not knowing which processes would be better candidates than others.

There are four main reasons companies find moving to a more paperless environment difficult:

Many times, the ***lack of a company-wide paperless initiative*** can cause a failure to gain the necessary support to implement paperless solutions. And the lack of such a strategy can lead to the development of solutions that achieve less than optimal benefits.

The increasingly **_"disconnected" nature of modern business_** makes it difficult to understand the true problems and associated costs inherent in paper-driven processes. For example, a company may choose to convert documents into a digital form in the back office but ignore the benefits that could be gained by capturing this data at the point of creation through mobile forms technology.

Legal issues can also create barriers to mobile forms. Litigation, claims and other legal matters have historically been reliant on paper forms, making it difficult to achieve greater acceptance of digital information. While applicable laws are supportive of paperless initiatives, companies are sometimes reluctant to eliminate paper.

User adoption presents another barrier. There is something that seems very reassuring when it comes to paper. This is especially true when it comes to signing or executing forms. Despite the implementation of electronic signature pads that emulate the act of an ink signature, people are still struggling with the transition away from paper. Studies show that in a typical electronic environment, 20% of customers would still prefer paper if given the option.

Mobile Forms Aren't Coming - They're Already Here

It doesn't have to be this way: the technology is available – and more importantly, the technology works. Mobile devices–smart phones and tablets – have tremendous potential to improve business processes throughout the organization. The proliferation of mobile devices, advances in technology, and customer expectations are all compelling reasons to implement mobile forms.

AIIM (Association for Information and Image Management) research reinforces the arguments for bringing business processes to mobile devices, but the revolution is just starting. 67% of respondents consider mobile technologies to be important or extremely important to improving their business processes. 31% consider tablets to be more important than smartphones, with 24% seeing smartphones as more important.[6]

More recently, the growth in telecommuting and use of mobile devices by workers in the field has dramatically increased the need for electronic access to business content. Email has been the killer app to bring these devices into business. However, it's time to "think outside the inbox" to open up new possibilities for more efficient business processes. The majority of AIIM respondents recognize this increasing importance of mobile technologies, with 48% considering it to be "important" and 19% "extremely important"–67% overall. For the largest organizations, this rises to 75%.[7]

Benefits Too Compelling to Ignore

Faster response time to customer requests, increased worker productivity and reduced operating costs can all be achieved through mobile forms. According to last year's AIIM publication (and countless other research papers on the topic), the benefits are stunning:

- 30% to 50% process improvement/productivity gains
- 3 to 10 times improvement in turnaround times
- Virtual elimination of "lost" documents (today that figure is north of 10%)
- Vastly improved customer experience

Yet despite all the benefits, most organizations are finding it difficult to implement successful paperless transformations. Sure there are attempts, some even successful, but by and large most are just beginning the journey (Figure 1)[8]:
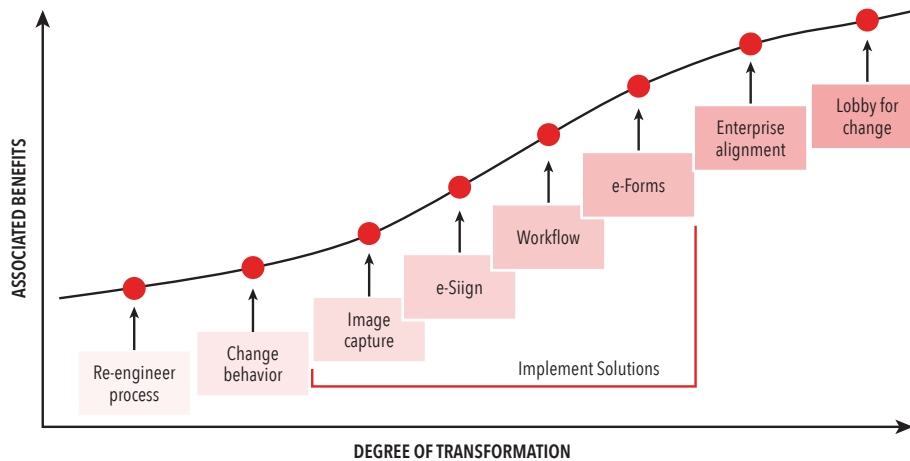

Figure 1: Stages of paperless transformation

10 Ways to Improve Any Organization with Mobile Forms

1

ROI

Many people think the switch to mobile forms will cost more, in terms of training, hardware and software, than continuing to be paper-based. However, while expenses do exist, the return on investment is enormous. For some businesses, the switch to mobile forms can pay for itself within a matter of weeks or months.

2

Lost and Misfiled Forms

7% of all paper forms get lost or misfiled. A secure and backed up paperless environment greatly minimizes the risk of losing or misplacing a digital form. And if a disaster should occur, digital forms can often be recovered, whereas paper forms could be gone permanently.

3

Improved Customer Service

Searching for forms and files while a customer waits on the phone is not an efficient process. When digital forms can be found instantaneously by keyword search, customer service improves significantly.

4

Labor Savings

Paper forms are extremely time-consuming to work with since it requires a great deal of effort to organize and retrieve them. On average, office staff spend about one hour per month searching for and replacing forms and files. If this is the case at your company, the move to mobile forms could pay for itself within a month.

5

Printing Costs

Printing hard copies of business forms requires the purchase of paper, toner, ink, the printers and their maintenance. In most organizations, going paperless can save more than $500 per person per year in these supplies.

6

Photocopier Costs

Photocopiers are very expensive to purchase and maintain. By going paperless, employees can access and edit a digital form, and then electronically send it to a co-worker or save it. These forms can also be accessed simultaneously, eliminating the need for multiple copies.

7

Email Management

Perhaps your staff is concerned that mobile forms will just mean more emails. However, with simple email management strategies, there is no need for staff to spend tedious hours organizing, reviewing and deleting emails. Emails should be treated like any other type of electronic file and immediately categorized into the appropriate folder.

8

Storage Costs

Paper forms take up space and many organizations are forced give up their office space to file cabinets and boxes of documents. Paperless companies greatly minimize their need for storage space as a single hard drive or the Cloud, can store millions of documents.

9

Improved Document Security

Paper forms are not as secure as you might think. It's pretty simple to access files in the office - even if there are locks on individual filing cabinets, they are usually not hard to break. Electronic security systems that require passwords track when forms are accessed as well as who accessed them and exactly what changes were made.

10

Disaster Recovery Strategy

If your organization keeps most of its information on paper, the threat of fire or water damage should be a serious concern. Mobile forms can be easily backed up and stored offsite or in the cloud, keeping forms safe if a disaster occurs and allowing for quick recovery.[9]

Take the First Steps to Reduce Paper

Changing existing business processes to paper-free can be a challenge, but one all organizations should investigate. Why remove paper forms from your organization's processes? Some of the benefits that can be realized by taking on this task include:

- Reducing the amount of time it takes to respond to your customers
- Improving the ability to search and share forms
- Making forms and information accessible for all staff, wherever they are
- Realizing space and cost savings

And then perhaps, a step beyond–business forms don't ever need to touch paper. Take another step, and you're going to revolutionize your business even further using mobile and cloud technologies to capture forms and data. The challenge is to capture data closer to the point of creation, routing it into the process, monitoring it once there, and making it available to whoever needs it, wherever they are, in the shortest possible time.

Recommendations:

- Look at existing processes and their reliance on paper forms. Question the status quo and how paper forms can be removed.
- Does your organization have the internal skills and resources to deliver such a project? If not, look for companies with the knowledge and experience to kick-start the paper-free journey.
- Include existing vendors as both consultants and potential service providers, freeing your own business of the need to invest in equipment and skills.
- Challenge vendors to demonstrate how your processes could be transformed and perceived barriers overcome.
- Keep it simple at the start.

> **"...how patient are you with companies you do business with as you fill out paperwork? Now, how do you think your customers feel about you?"**

The opportunities for improvements for processing forms are being driven largely by customer expectations. Your customer doesn't care why it takes your business longer to fill out and process a paper form, nor why the help desk can't see the form they mailed two days ago. But, they will be impressed by a mobile worker who can confirm approval face-to-face and capture the signed forms there and then - or the health worker who can access records at the bedside and gain consent to the treatment with a single on-screen signature.

Lastly, here's another way to think about the stubborn reliance on paper: how patient are you with companies you do business with as you fill out paperwork? Now, how do you think your customers feel about you?

Citations

1. Aberdeen Group "Handling Paper in the Digital Age"

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4. Aberdeen Group "Handling Paper in the Digital Age"

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9. AIIM "Ten Benefits of Going Paperless"