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Banish the Paper

By Jeremy Martin, CGB, CGP, GMB

This is not your father's remodeling business. Increasingly, the work of remodelers is the job of managing the flow of information. Our success depends on how well we communicate with project managers, clients, architects, engineers, governmental entities and subcontractors. Our clients demand real-time communication and collaboration. To succeed, our employees require immediate access to the ever-changing flow of information that drives our projects.

This information must be instantly available, easily edited, sharable and accessible in various venues and on multiple platforms. It needs to be secure and backed up. In short, it must be digital. To deliver at this level we have only one option: Banish the paper.

In a business renowned for its abundant paper — specifications, permits, bids, inspection reports, bills, credit card receipts to name a few — the task seems daunting. To cross this chasm, we started with a very simple premise: We have no choice. We can't deliver the client experience demanded by our marketplace any other way. We must cross our Rubicon. We must burn the boats. There is no other path. This was a liberating moment for our team — the moment of total commitment.

In our firm, the solution breaks down into three simple steps: Collect and Convert, Name and File.

Step 1: Collect and Convert. You must collect all sources of "information" in your ecosystem. Some may already be digital; those are the easy ones. Contact your bank and request digital statements. Encourage your more progressive subcontractors to email their invoices. The rest you must scan.

This is easier, faster and cheaper than you think. We have three Fujitsu ScanSnap scanners — total investment $1,200. In theory, we could go with one, but we are all too addicted to ours at this point. A word of caution: Do not rely on your all-in-one printer/copier/scanner. If you commit to going paperless, commit to a dedicated piece of hardware. You don't trim your homes with a framing gun. One-touch, dual-sided, sheet fed scanning to PDF is an absolute must.

Step 2: Play the Name Game. It was Shakespeare who asked, "What's in a name?" Everything, it turns out. Some of you are stuck in your old ways. You think about filing cabinets, tabs, folders and hierarchy. Start thinking like a search engine. Name your files well, and your filing system

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becomes less important. Do we still have a filing system? You bet. We have to store documents somewhere, so it has to make sense. But as a last line of a defense, a well-named file can never truly get misplaced. It can always be found by searching. Develop a naming convention, train your employees and enforce discipline. We've found most breakdowns in our system originate with a misnamed file.

Step 3: File. You've collected, converted and properly named your files. Now it's time to store those electronic documents in some agreed-upon folder structure. Maybe it mimics the paper folders you currently have in place. Maybe you take this opportunity to start fresh with a new and improved online filing system.

For the truly paperless enterprise, some questions remain. For example, how do you digitally approve that supplier invoice? How do you digitally sign a subcontractor's proposal? The same way you always have. Don't get tripped up here. Any well-thought-out, well-documented paper system currently running in your company can be converted to a paperless workflow, and it doesn't take a room full of programmers or an IT director.

We use a combination of Adobe Acrobat for signing, altering and date stamping PDF files and an online file service such as DropBox for storing and sharing. These are off-the-shelf, inexpensive, easy-to-use and available everywhere and on multiple devices. If you can surf the Web, you can do this.

A word of caution: If you don't currently have good processes, that weakness is about to be exposed. If you can't successfully convert your current system into a digital one, there is a reason. Your system is either nonexistent, loosely defined or multiple systems exist. Be assured, going paperless will force you to fine-tune your systems. We embraced this truth as an opportunity to improve, and so should you.

How do I know going paperless works? Our office manager recently asked what we paid for our scanners. I paused for a second. "Do we need another one?" I asked. No, she wanted one for home use. I've had one at home for years. My business partner purchased a scanner last year for home. One of our project managers just asked me about a mobile scanner for his truck. We've created a paperless monster, and our clients are benefiting. **QR**

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