

Want to go Digital? Avoid These 5 Common Mistakes

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When people hear the term 'paperless' or 'digital', they immediately conclude that it refers to complete digitization, that is spending hours converting written documents into [digital documents](#) & learning new ways of managing office paperwork. But that is not the whole truth. Yes, 'going paperless' means digitizing your document processes, but the transition isn't as time-consuming & instant as you might think.

Most companies that vow to go paperless take the gradual approach, which is digitizing a few processes at a time. Even most Fortune 500 companies are yet to achieve 100% digitization. This is because you cannot instantly digitize & automate every process in a company. Unplanned or accelerated digitization can compromise data safety, result in employee-information gaps, and create more barriers in day-to-day operations than it was supposed to break down. So, let's look at some of the common mistakes you need to avoid when you decide to go paperless.

Why go Digital?

- Saves time & money
- Better for the environment
- Easier to manage
- Reduces errors
- Increases accessibility
- Better security & tracking
- Improves productivity
- Easily scalable

5 mistakes to avoid when you go digital

Transitioning too fast

Most people that prefer to stay away from going paperless are the ones that think it needs to happen immediately. Going digital is a gradual process. You need to identify which processes are in desperate need of digitization and start with them. Once your staff is acquainted with the new ways of managing documents, you can move on to digitizing other processes. The goal is to reduce your reliance on paper, even if it means not being able to completely eliminate it.

Using a single-page scanner

Going paperless means converting physical documents into digital documents. This process can take up way too many hours if you have to digitize thousands of documents using a single-page scanner. If you want to go paperless, we suggest you purchase or rent a faster multi-page scanner, or hire a scanning firm to assist with the process.

Avoiding a document management system

Managing digital documents can be as difficult as managing physical documents if you use tens of different tools like emails, shared local and online folders.. The best way to manage digital documents is by using a document management system like [GLOBODOX](#), which acts as a central repository of all your documents and allows you to conduct all document processes like scanning, organizing, storing, searching, tracking & securing within the same software. Document management system can be on-premise or cloud-based and are slowly becoming a must-have tool in today's business environment.

Not naming files properly

Another common mistake people make when digitizing their documents is not naming their files properly. Let's say you have to digitize monthly invoices from 50 different clients over the last 12 years. How do you name them in the most efficient way? The best way to name each invoice would be to include the date, invoice number & client name, . This is how the invoice title should look like 2014-06-13-IN780123-ABC-Corp.pdf. This format of naming documents makes it easier for you to differentiate between thousands of documents & retrieve them when required. Of course if you use a [document management software](#) like GLOBODOX, then you will have an infinitely superior system for indexing and categorizing digitized documents.

Inadequate training for the staff

The ability of an organization to go paperless or go digital largely relies on its employees. Even something as trivial as learning new software or changing a set process can be taxing for certain people. That is why it is essential for companies to provide all the necessary support & resources to their staff during their digital transition. This means providing adequate training, acquiring feedback, understanding their needs & more. Enabling a smooth transition can largely reduce costs & improve productivity.

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