



Guide to Going Digital: Best Practices to Help You Get Started

A practical approach to starting or accelerating your organization's transformation into a modern, digital government agency.

Why You Should Digitize Now

Digitization is an obvious first step for organizations looking to automate processes, speed search and retrieval of content, and reduce physical file storage. It is also critical in improving service delivery and customer experiences. Today, speed, ease, and security are basic expectations for the public, and paper just can't deliver on those expectations. Working with paper-based content is slow, complicated, and difficult to keep secure.

In addition to improved service delivery, content digitization helps:

- Decrease operational costs and reduce physical storage
- Automate tasks
- Increase productivity
- Improve searchability and shareability
- Tighten data privacy and security measures and protect content
- Strengthen security and compliance with legislative rules and regulations



However, for digital transformation to be successful and provide ongoing benefits, it must go well beyond simply turning paper records into digital ones. It should be driven by a holistic strategy that includes carefully defining organization-wide goals and objectives to ensure that the true value of going digital is realized.

Remember to get specific and be thoughtful in the process. While there are clear benefits to digitization, understanding your organization's specific needs—by looking at factors such as document processes and resource restraints (e.g., staffing, space, infrastructure, budget)—is critical to success.

Think about what you want to accomplish, and build a strategy around those goals. What do you want to achieve? Maybe it's a shorter process for sharing information internally or a speedier customer response? This is also a good time to carefully consider how your documents are used.

Docufree has helped many organizations successfully digitize. Although getting it right takes an approach tailored to the specific needs of each organization, the following three best practices have proven to be an effective and practical guide for getting started.

1

Know What You Have

Inventory, Classify, and Prioritize

The first step is to inventory and classify the paper-based content you have. Then, determine which documents should be digitized.



Questions you should ask:

- What documents are requested most often?
- Which ones require the highest levels of security?
- Which document-centric processes and workflows are the most time-consuming?
- Do you want to provide improved access to content?
- Is usability limited because of format or location?

Analyze and select document populations to be digitized based on what will have the largest impact and consider how digitizing will improve productivity. For example, will digitizing content save staff time, enable automation, or eliminate the need for physical storage?

Some content may be less of a priority, so it's also important to identify those document populations. This includes documents that should be destroyed, are close to their end-of-retention lifecycle, or aren't used frequently.

Documents should also be categorized (e.g., medical, education, public safety, etc.). This will make the next stage of the process, prioritizing and planning, easier.

Prioritization

Review the types of documents you classified during the inventory process and prioritize them for digitization.

Similar to how a doctor might ask you to rate your pain on a scale of one to five, ask the same question in relation to your documents. If you were to lose the documents forever, how much “pain” or disruption to your agency and/or your customers would be experienced?

We find many times there are documents that are absolutely critical to processes and others that may not affect daily processes, but may have storage costs or other requirements that can be a priority as well. Prioritizing these document populations will be specific to your agency and processes, but can help in determining what documents need to be digitized first.

HIGH

- Frequently accessed or retrieved
- Compliance risk
- High impact if lost/destroyed
- Central to business processes
- High cost to store, retrieve or manage

MEDIUM

- Used occasionally
- Some impact if lost/destroyed
- Limited accessibility
- Taking up valuable space
- Substantial storage cost and/or personnel cost to file/manage

LOWEST

- Used infrequently
- Significant storage and management costs
- Long-term retention required



2

Know What You Need

Planning and Change Management

It's important to keep in mind that new initiatives that change established systems and processes mean potential disruption to groups throughout your organization. You may face resistance to new processes even when they provide clear benefits, simply because they present changes to accepted ways of doing things.

A thoughtful and inclusive approach to presenting the benefits of your digital transformation to all internal stakeholders and partners will go far in assuaging resistance. Take time to address not only how digitization will solve problems but also review the change management plan for the new processes. Ask for input.



A well-developed plan will be the most important document you create.

The plan should address how going digital will affect your:

- Existing processes and technology
- Departments and organizations
- Customers
- Employees

Content Storage

Once content is digitized, you should have a plan for how and where to store it. This is a critical step in the planning process, since having the right system in place can make a huge difference in the opportunities for automation, integration, and process improvement.

Access

Ideally, your content files will always be at your fingertips after digitization. The right content management application will make uploading, searching, editing and sharing files possible—anywhere, anytime—with just a few clicks.

Security

A dedicated and secure cloud-based solution is a smart way to securely store, organize, and share your digital files. A digital file room in the cloud provides easy search and retrieval, simultaneous review, and protection from environmental factors. It also frees up physical storage space for more productive use. Cloud document storage also allows you to maintain control over documents and catalogs with extensive and configurable permission settings.



This is also the time to consider the need for backfile conversion, day-forward scanning, or scan-on-demand. Here's how each works:

Backfile Conversion:

Digitizes legacy documents associated with previous years' activities.

Day Forward Scanning:

Documents that are currently active are converted as they enter the workflow.

Scan-on-Demand:

A scan-on-demand process digitizes as the need for certain files or content types arises.

In many cases, all three types of digitization are used. Day-forward conversion is almost always utilized because it increases efficiency. The initial effort to inventory your documents (highlighted in step 1) will help you determine which conversion option—or more likely combination of options—is most optimal for your agency. Those questions you answered about document use also will be very valuable at this stage.

Taking A Staged Approach

Implementing large changes all at once can often be overwhelming in both the process and price categories. It is also difficult to know if the plan will work as intended and so as you start to implement these initiatives across the organization and things aren't working, the plan falls apart.

Typically, we find that starting with a more palatable "bite-size" approach leads to success. For example, start with one department, learn what works and what doesn't, and adjust as you begin to add on other departments or document types.

Attacking the problem in stages can help reduce failure and confusion, and help improve adoption.

3 Determine How to Start

To partner or not to partner?



A key decision in going digital is whether to manage it internally or bring on the expertise of a partner. Base your decision on factors such as internal resources, budget, timeline, goals, and size of the project.

Most organizations lack the equipment, software, and staff expertise to execute a major digitization project. Expert vendors provide digitizing services, technical advice, and sometimes even long-term maintenance and support.

The advantages and disadvantages of both an exclusively in-house digital transformation and one managed fully or partially in-house should be carefully reviewed.

Attempting to do it in-house will mean:

- Large initial and ongoing investment in resources, equipment, and training
- Significant ramp-up time
- Variable/unknown costs
- Opportunity costs related to resources

An experienced and trusted partner assures:

- Cost containment and limited risk
- Ability to contractually define timeline to meet objectives
- Limited disruption to your operations
- Broad range of service options
- Compliance with state and federal regulations governing information protection

You'll also have to decide if the work will be performed on- or off-site. Off-site processing may be less disruptive, but it will involve document transportation and security risks to manage. It's important to weigh the costs, challenges, and advantages of these factors.

If you engage an expert partner to perform digitization, ensure the work is done in a secure on-site or off-site facility, with chain of custody practices that enable document tracking through the entire process. They should follow strict security protocols and use ANSI/AIIM standards.

Key Takeaways



For any size organization, eliminating paper-based content and processes can seem like a monumental undertaking. For agencies with large amounts of historical and daily content—and especially those that have not yet begun or are in the early stages of digital transformation—it might even feel like an insurmountable challenge.

With a strategic, time-tested approach, digitizing your agency is a realistic and manageable goal. Digitizing can deliver measurable organizational benefits—including service delivery improvements, cost savings, and increased resource efficiencies—making it well worth the time and effort.

Still Have Questions?

At Docufree, we partner with our clients to implement service and technology solutions that revolutionize everyday tasks by improving the usability of content. We believe that digitizing is most valuable when paired with the right tools to manage digital content. Our content services platform offers a wide range of capabilities, from scanning and data capture to advanced content management technology, and it integrates easily with process and case management systems to create an easy-to-use, seamless digital experience.

Step 1: Prioritize

The first step is to classify and assess your document inventory.

Identify document populations and processes:

- Which documents are accessed most frequently?
- Which require the highest security?
- What document-centric processes take the most time?
- Is access to content limited because of format or location?




Step 2: Plan

Develop your plan with particular emphasis on the impact it will have and how things may change in the future.

Consider the impacts of these changes on:

- Existing processes and technology?
- Other departments and organizations?
- Service delivery to customers?
- Employees and key stakeholders?



Step 3: Partner (or Not)

Determine if you need to partner with experts or go it alone.

Evaluate:

- Initial investment in resources, equipment, and training?
- Overall timeline and ramp-up time?
- Risks, including variable and unknown costs?
- Opportunity costs of resources?