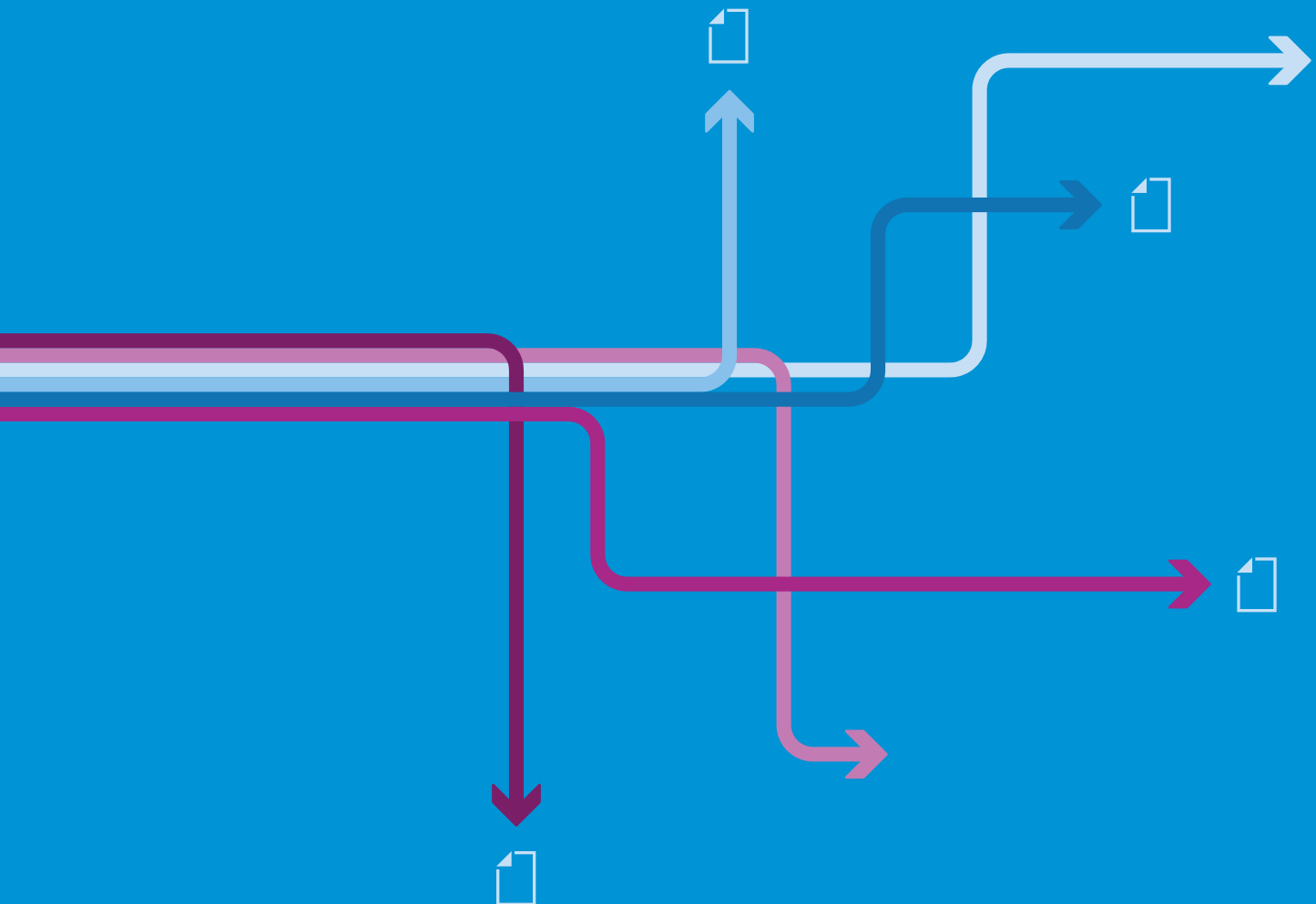


The document management workbook

A practical guide for smarter document processes in growing businesses



The importance of document workflow

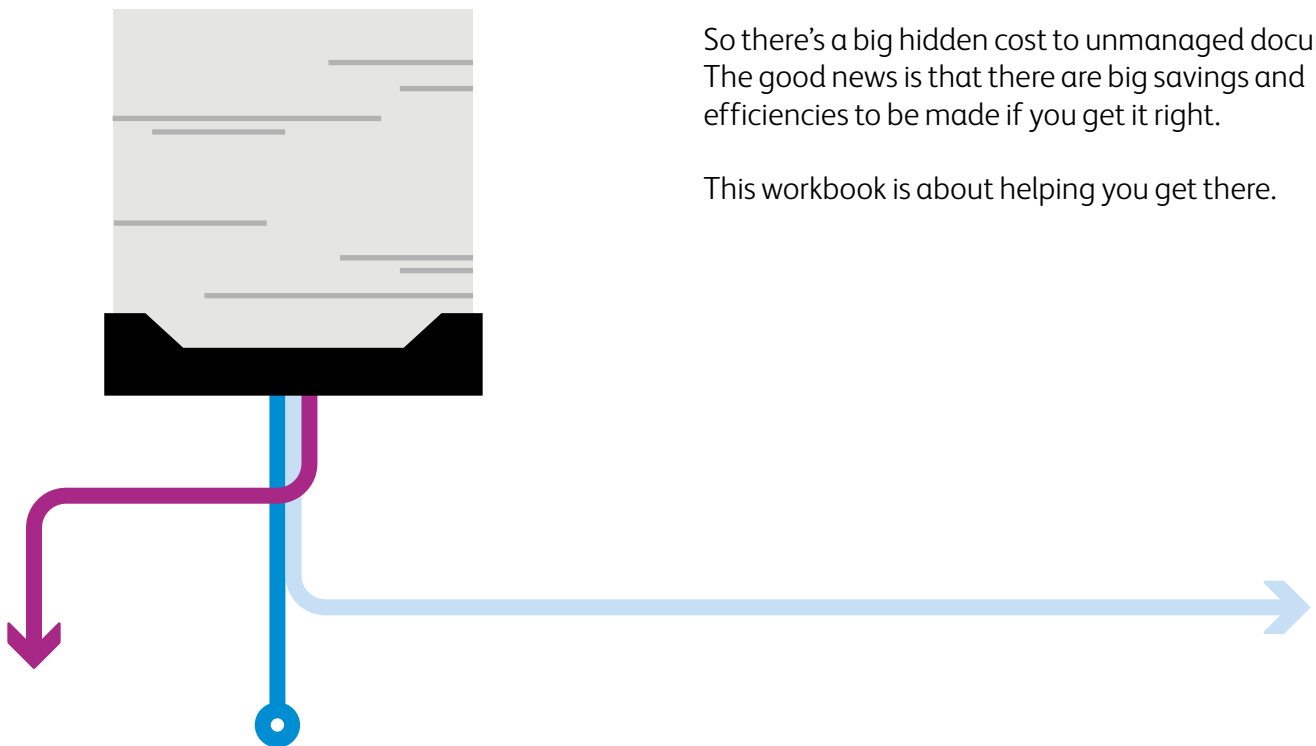
Even with the mobile and cloud revolution in full swing, **more than a third of processes are document driven.**¹ And almost **three quarters of small medium sized businesses (SMBs) say printing is critical to their activities.**²

In fact, print represents an average of 15% of an SMB's overall budget; if you have a million dollars to spend on IT, that's \$150,000.³ And it accounts for at least 12% of IT resources.⁴

If that figure surprises you, you're not alone. As you'll discover, most people underestimate the amount they're really spending on document management. They also don't realize the various inefficiencies that are affecting their productivity and using up IT resources.

So there's a big hidden cost to unmanaged documents. The good news is that there are big savings and efficiencies to be made if you get it right.

This workbook is about helping you get there.



How did we get here?

Before we dive into the details of the solution, let's have a quick look at the problem.

Document management is often overlooked

Most businesses don't give document management the attention it deserves. As a result, companies end up with unnecessary expenses and unexpected issues that take up IT's resources and make users less productive.

The hard costs start to add up

Without any governance or processes in place, companies often spend far more on paper, printers, multifunction printers (MFPs) and toner. In particular, the proliferation of cheap printers start to cost the company a lot more than anyone realizes in the long run.

The soft costs take their toll

When document processes are slow and clunky, employee productivity takes a hit.⁵ Additionally, the 40 to 60% of all IT Helpdesk calls that are print-related⁶ start to take up IT's time too.

In short: there's lots of room for improvement.

Let's get started.

Assessing yourself

Before you can start optimizing your print environment and managing it in a simpler, more efficient way, you have to be able to assess its current state.

Getting started really comes down to answering three big questions.



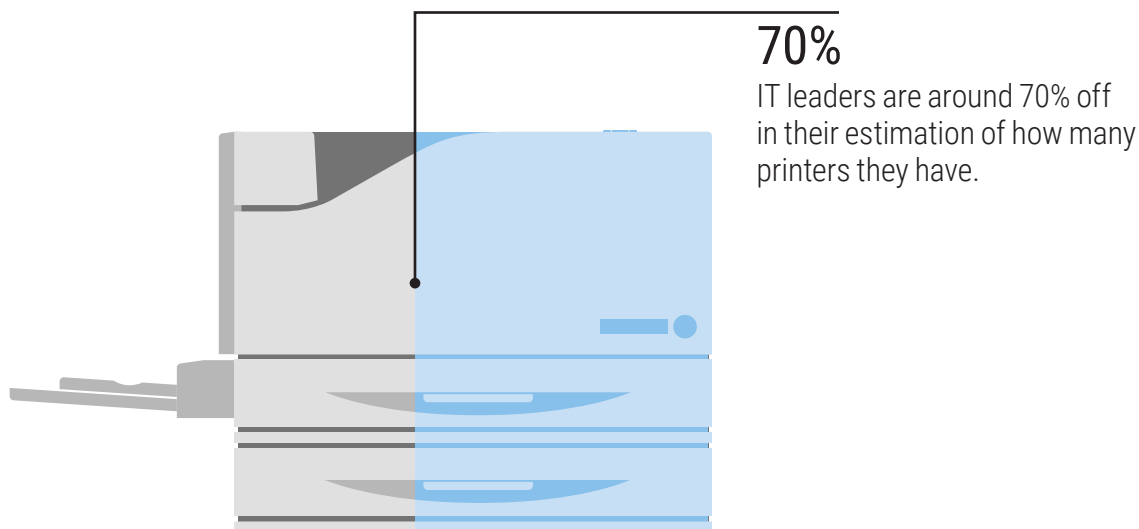
1. How many printers and MFPs do you have?

Now this may sound like an easy enough question but it's actually one that most people get wrong. We've found that IT leaders are typically around **70%** off in their estimation of how many printers they really have. And nearly 60% of the devices they think are in use have already been retired or replaced. Since no one person controls or tracks these movements, most lists are out of date.

Accurately determining the scale of your print environment is the crucial first step you need to take in order to figure out how and where you can be saving. That means figuring out:

- How many printers and MFPs you have – both shared and local
- How many different brands of print devices you have

Once you have this information, you can start to determine how many printers you really need and how many different vendors you're comfortable dealing with.



2. Where are the printers and MFPs?

The next step is to identify where devices are, and whether it makes sense for them to be where they are. Unless you've previously carried out a similar exercise, that's unlikely to be the case. So when you're looking at your office's layout, ask yourself the following questions to determine whether your printers are ideally located:

Are shared printers conveniently located?

Picking the right spot for a larger, shared printer means understanding how far people will be willing to walk to collect their print jobs and whether or not there's a shared printer within their range. Once you've observed that, you'll have a better sense of how you might optimize the number of shared printers available to your people in a way that maximizes convenience and minimizes cost.

How do people use them?

In different teams and parts of the office, there are different requirements and constraints for document workflow. A reception may need only one printer for a large number of potential users. And HR may need its own printer or MFP so it can manage confidential documents. Here, the balance you're looking for is between ensuring everyone has easy access to a printer, but only certain groups that really need a private printer can get one.

How many people need mobile printing?

While you're scoping out how different groups use your printers, it's worth finding out how many of them would benefit from mobile printing and easier integrations with cloud repositories. If it's clear a large number of users would benefit from cloud and mobile connectivity, well, you'll know what to aim for.

3. What are the workflows?

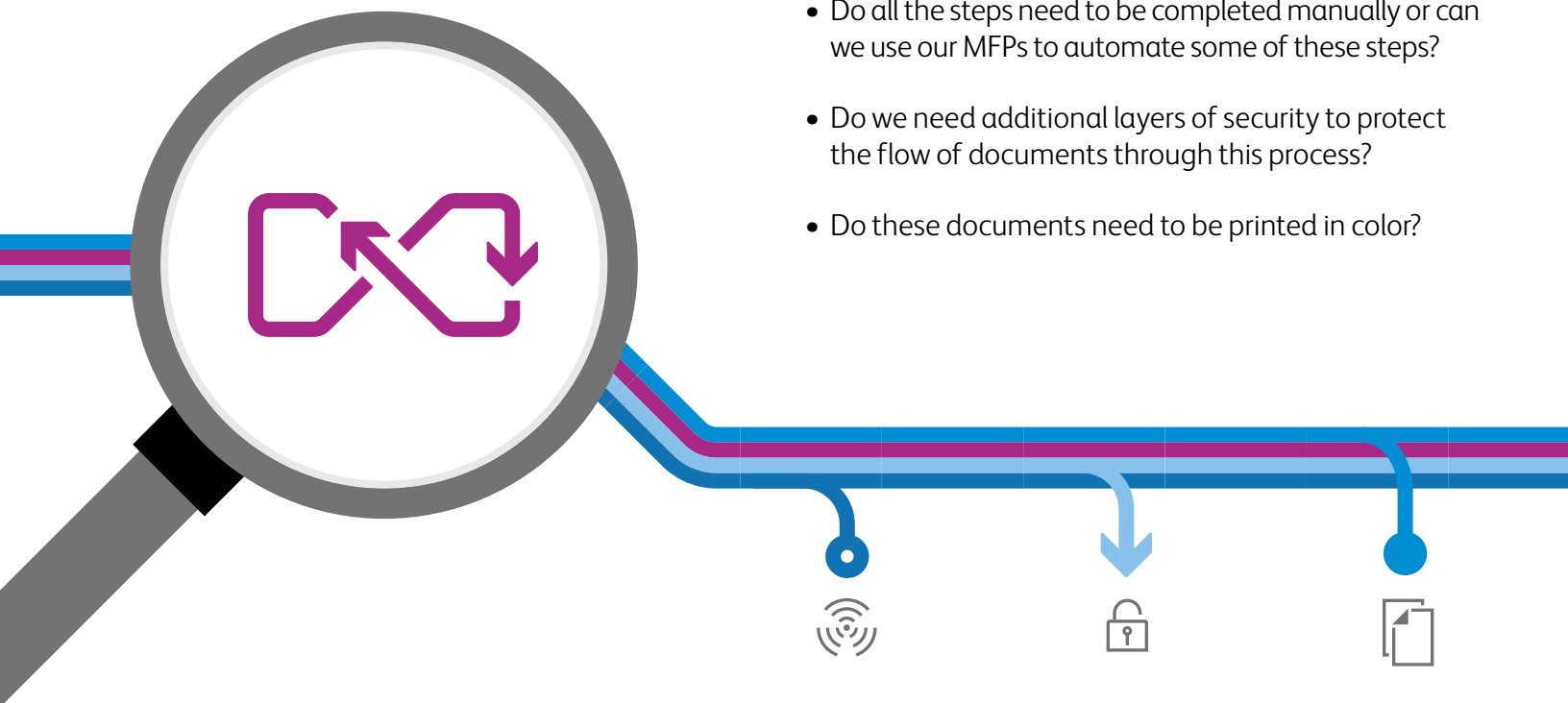
The final big question you need to be asking when scoping out the scale and nature of your document management needs is about the workflows people are using your print infrastructure for.

As we mentioned, more than a third of business processes are document-driven. So don't worry about capturing all of them in your initial assessment.

Instead, pick three important processes (such as purchase to pay) that rely on documents and then create a rough outline of the workflow needed to complete them. If you need to, grab someone from another department to get this right.

Once you've mapped it out, ask yourself:

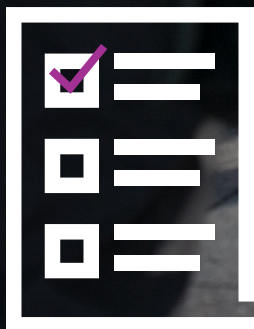
- Do all the steps need to be completed manually or can we use our MFPs to automate some of these steps?
- Do we need additional layers of security to protect the flow of documents through this process?
- Do these documents need to be printed in color?



The document management checklist

A quick and easy self-assessment checklist for your document processes

Now that we've outlined the big questions you need to answer to scope out your document management needs, let's test how much you know.



Questions

- 1

Mapping your print environment
- a

How many printers, copiers and MFPs do you have?
- b

How many brands of printers, scanners, copiers and MFPs do you use?

Answers

- 1
- a
- b

2 User to printer ratios

- a

How many average users per printer or MFP?
- b

How far do people walk for shared printers?
- c

How many ‘personal’ printers are there?

2

- a
- b
- c

3 Controlling hard costs

- a

How many printers offer color?
- b

How many people actually need color?
- c

How many people actually buy toner cartridges for printers?
- d

Are all your devices standardized on economy settings?
- e

How many printers switch into low-power mode when lying unused?
- f

Do people use printers on weekends?

3

- a
- b
- c
- d
- e
- f

Questions	Answers
<div><div>4</div><div>Controlling soft costs</div><div><div>a</div>What percent of your helpdesk calls are print-related?</div><div><div>b</div>How many print vendors and related invoices do you manage and process every month?</div></div>	<div><div>4</div><div>a</div><div>b</div></div>
<div><div>5</div><div>Securing your environment</div><div><div>a</div>Are your printers set up to only release documents after users have validated themselves (pull printing)?</div><div><div>b</div>Do your MFPs give you an audit trail about users, documents and when jobs were run?</div><div><div>c</div>How many printers have documents lying in the printer tray?</div></div>	<div><div>5</div><div>a</div><div>b</div><div>c</div></div>
<div><div>6</div><div>Connecting your environment to workflow</div><div><div>a</div>If people need to print from cloud apps such as SharePoint, Dropbox etc. how many steps does it take them?</div><div><div>b</div>Are you set up for mobile printing?</div><div><div>c</div>Do you have any filing cabinets filled with hard copies you don't legally need to keep?</div><div><div>d</div>How long does it take you to configure a brand new printer or MFP?</div></div>	<div><div>6</div><div>a</div><div>b</div><div>c</div><div>d</div></div>

Once you have a detailed understanding of your print environment you can really start figuring out how to make improvements. So use this checklist to get a better sense of what that looks like now, and then use the tips in the next section to figure out what to aim for.

What good looks like

Consider these best practices to start uncovering those efficiencies and savings your company needs.



1. Tips to help your team work better

Digitize workflows

Get rid of the repetitive steps needed for common processes. You can create customized, one-touch digital workflows (such as scanning an invoice and saving it to a specific shared folder) using the front panel interface on your MFP. Then, once you've defined the workflow, you can save it as an 'app' so that users can finish those tasks in one step.

Integrate with mobile

Give your users easier ways to connect and print, from any device, anywhere at any time. Choose a cross-platform solution that's integrated with your regular applications and makes printing as easy as sending an email. In the process, you'll eliminate the need for some users to install third-party solutions, which increase the burden on IT support and could create security issues.

Integrate with the cloud

Remove unnecessary steps by integrating your print infrastructure into new cloud productivity and storage tools like Dropbox and Google Apps for Work. Most users typically have to use email or their desktops to send print commands, even though they're already using these cloud apps. By integrating these apps with your printers, you cut one step out of the process and free your users up to connect to any systems they need.

Improve your security

One of the biggest reasons to optimize your document workflow is security. Documents left in print trays may have internal or commercial sensitivity. Network security can be compromised by unauthorized third-party apps downloaded to enable mobile printing. Multifunction printer hard drives may also contain sensitive data that should be erased after printing. BYOD increases the complexity of device management, both authorized and unauthorized. Carrying out a comprehensive analysis of your document workflow will help you eliminate these issues and operate more securely.

2. Tips to free up your IT staff and stay in control

Worldwide, SMBs devote 12% of their IT resources to printing support⁷, a figure that rises to 17% in the US. The single biggest challenge that small and medium sized businesses face is controlling ongoing costs. 32% of SMBs say that print-related support is on the increase.

Here are some strategies you can use to reduce the burden on IT support:

Outsource your print helpdesk

Reducing the burden of the 40% of print-related helpdesk calls that waste both IT and employees' time starts with smarter workflows. But if you really don't want to be fielding those calls, consider outsourcing your print helpdesk to an expert.

Order supplies proactively

Your MFPs can alert you or your IT partners when they're running low on toner. This goes a long way towards removing the waste caused by different people buying toner and supplies at different times.

Simplify configuration

Instead of manually configuring and setting up every single new MFP, you can just 'clone' the configurations from a previous machine and apply it to any new ones. It's faster, easier and less prone to error.

Troubleshoot remotely

Instead of rushing out to users when something breaks down, choose MFPs that give you the ability to troubleshoot from your computer.

Discover the benefits of Managed Print Services

Given the importance of document workflow to business, and the complex nature of print environments, it may make sense to outsource the entire process to a partner.

A Managed Print Services (MPS) provider will seamlessly manage your print infrastructure, letting you focus on business. This provides significant benefits for companies of all sizes:

- A single point of contact for all print management issues
- Peace of mind knowing that you're monitoring, managing and optimizing your entire print environment, regardless of brand
- An optimized mix of devices, providing a balance that serves your people and your budget best
- A common UI experience for consistency across offices, easy hot swaps and a low training curve
- A proactive approach that solves print management problems fast and ensures constant supplies replenishment
- A roadmap for the future, including ongoing automation of routine tasks and a move from paper-based processes to digital ones

Getting document management right

Despite the steady rise of mobile, cloud and virtualization, documents remain a cornerstone of business.



Getting document management right

So the management of your document processes is essential to improving the way your people work. While most ungoverned and overlooked print infrastructures are usually full of waste and inefficiency, it doesn't have to be time-consuming or complicated addressing all those issues.

The steps in this workbook will help you get started, and allow you to make savings, improve efficiency and reduce your IT support costs.

The result

Your employees will be more productive, your IT staff will be able to focus on what's important and information will flow through the company in faster, smarter and more efficient ways.

Take it to the next level

For a more complete solution, you can arrange a Print Assessment. This comprehensive exercise includes automatic discovery to reveal what printers and MFPs you have and what they're printing. What-if scenarios can give a breakdown of potential cost savings and efficiency improvements.

The assessment results in a custom report with detailed analysis of your print environment, together with a concrete action plan to save costs and operate more efficiently.

About Our Partnership with Xerox

Working side-by-side with Xerox, we apply our expertise in image processing, analytics, automation and user experience to engineer a flow of work customized to improve the productivity and efficiency of your operations.

We create meaningful innovations and provide business process services, printing equipment, software and solutions that make a real difference for our customers.

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Sources

¹ Poor document processes lead to significant business risk, IDC

² Quocirca

³ Quocirca SMB MPS Study, 2014

⁴ Quocirca SMB MPS Study Europe USA High Level Exec Summary January 2014

⁵ Xerox research

⁶ Xerox RealBusiness Magazine – Gartner ITxpo Issue, 2012

⁷ Quocirca