

# news

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**R**apid technological advances have made computers commonplace in our homes and offices. Many thought this would reduce or even eliminate paper records, never imagining it would have the opposite effect. Computers allow us to create and access information so easily, we started printing more.

Now the trend is to encourage clients to reduce paper and go “green.” Today’s technology makes it easier to read electronic documents and complete everyday tasks without printing. NAPO’s Technology SIG has a few suggestions for NAPO members who are helping clients leverage these trends.

## Technology Can Help Reduce Paper

Adoption of a green or paperless approach to organizing has been driven by new technology. Tablets like the iPad make it easy to reduce paper with applications (apps) for reading books, maps, PDFs, task lists, e-mail and calendars — all without printing anything. By opting for digital editions of magazines, newspapers, and newsletters, clients keep paper out of their homes and offices. According to the North Carolina Office of Waste Reduction, it takes 75,000 trees to print a New York Times Sunday edition. Imagine the positive environmental impact if more clients go digital.

A great way to help clients go paperless is to show them how to prevent paper from ever entering their homes. By converting to online bill paying, e-mailed monthly statements, and PDF versions of their favorite catalogs, they can actually store more information electronically, and reduce their paper clutter.

New cloud-based tools such as DOXO, Mint and PageOnce can aggregate a client’s financial accounts, giving access with a single log-in and password. This makes bill paying an easy, one-step process. Another system would be to help clients set up online accounts for their various bank and credit cards, and then create bookmarks so these webpages can be easily accessed and organized.

Using a web browser bookmark that permits the opening of multiple webpages in tabs makes research easier and reduces the urge to print. For example, if a client is researching vacation destinations or major purchases, she can bookmark those pages in a folder and later review them all simultaneously.

Another way to reduce the need to print is to use webpage readers like Safari or Read It Later. Clicking toolbar buttons in these applications optimizes a webpage for easy reading. Combining articles from multiple webpages removes ads and other clutter. Webpage readers create documents that can be e-mailed or saved electronically.

Help clients to explore apps to best suit the life they lead and the information they need. Shared calendars such as COZI, Google Calendar, or Calengoo help families and work groups access each other’s schedules across multiple devices. List managers such as To Market, HandyShop- per, or Grocery IQ for Smartphones can manage grocery lists and other shopping reminders. The view can be customized by item, category, or store. With mobile devices always at hand these days, clients can say goodbye to paper-based lists.

Personal document scanners with sheet feeders reduce the need to store paper files by converting paper to digital. Clients can digitize everything from tax returns to their favorite recipes. Scanned documents can be shared electronically without making hard copies. Search tools make finding and viewing scanned documents much faster.

Caution clients not to start their paper-less journey by scanning everything they own. Begin with a purge. Eighty percent of what's filed is never looked at again. Much of what we store has a limited shelf life and should be going out the door soon anyway. A productive best practice is to begin a scanning process with what's coming in today, before trying to work through any backlog. Address backlogs in incremental chunks after the client has a handle on what's coming in.

Having a backup system for electronic information is crucial for clients. If paper is lost or destroyed, it's difficult to replace, but digital information is never lost with reliable backup processes in place.

## Paperless Strategy for Businesses

Both large and small businesses have multiple scanner options today. Their choice of technology will depend on a variety of factors such as the volume of paper-flow and location of equipment within the office. Advise your business clients to scan only records that have a clear business value or are critical to sustaining the business.

For smaller companies, storing records is now a much more cost effective and secure option, thanks to the explosion of cloud-based solutions. However, being able to retrieve those records requires a search-able index. In this instance, technology can be our best friend. Indexing, tagging, and searching—this is what computers do best! What would it be like for clients to be able to immediately locate any of their company's information, paper or digital, immediately, using something very much like a "Google" search?

## Maintaining Paperless Success

Just like paper records, digital files need a place of their own. The best systems allow clients to store and retrieve electronic documents in a secure and easily accessible way. Searching by keywords or tags makes finding electronic information much quicker, meaning the client is more likely to use it and stick with it.

Know your client's comfort level with cloud (internet-based) software versus local programs (stored on their computer hard drives.) Direct them to solutions fitting their budgets and meeting their storage needs. For smaller storage needs, take advantage of online applications offering free trials or free accounts, such as DropBox, iPEP from the Productive Environment Institute, and Google Docs.

Some clients, for many reasons, will not be ready to move to cloud storage. Help them to organize a folder system on their local computer to categorize and store electronic files. Use consistent naming conventions for folders and documents to remind clients of what goes where. Avoid overusing subfolders. Use a desktop search tool such as Google Desktop, Copernic, or X1 to make searching by keyword or file name fast and simple.

Recognize that for now, we're all navigating between paper and electronic information, and this will likely continue for another generation. After all, papyrus and clay tablets coexisted for centuries. For best results, define your client projects as "less paper" rather than "paperless" and start there.

NAPO's Technical Organizing SIG is a special interest group dedicated to supporting organizing and productivity companies whose primary focus is using technology to solve clients' organizing issues.

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