

Transitioning from paper to electronic records: Nothing good comes from cutting corners

The temptation to cut corners while migrating from paper to electronic documentation is a common pitfall for many organizations. In 99.9% of cases, it's not intentional. It's all too easy to cut corners without even realizing it is happening. There are a multitude of variables to consider with a migration project. If an organization misses two or three of those variables, the impact will not be recognized until years down the road. The potential disaster lies dormant, like a volcano, waiting to erupt.

One year, after speaking at the Society for Human Resource Management (SHRM) conference in Chicago, I received an email from the CEO of an HR consulting firm. She described a client who had been keeping paper and electronic employee files for 10 years, in other words, a big mess. It was hard to know where to start in terms of helping her client with this transition. She asked the type of question I hear over and over: "*Can paperless be done without an index system?*"

Her client's company is perhaps on the more manageable end of the scale, say 60 or so employees and 20% turnover. I told her that, regardless of company size, I would never recommend cutting the index system corner. Think about it: How much time would it take to locate a document from an employee's personnel file who may have been with that organization for eight years? Despite this company's scale and turnover rate, they could find themselves in a future pickle, namely from an efficiency standpoint. I finished my reply by telling her, "I've never heard a happy ending that starts with, 'We didn't use an index system!'"

Take this real-world scenario: An organization stored documents in multiple locations, incorporating several management platforms that do not communicate and without a central repository. As technology improved, the systems became obsolete—even potentially dangerous to the foundation of the organization itself. Once the organization realized its plight, and its desperate need to correct the storage structure, document migration began immediately. They soon realized their hasty and panicked technology decisions did not take into account an ancient platform used by a satellite office housing critical documents. The conundrum reached larger-than-life proportions, as the organization had already financially committed to a new software package that failed to communicate with this forgotten platform.

So, why would an organization doom a project before it gets off the ground? The answer is actually quite simple. Ten times out of 10, it's a lack of strategic and analytical thinking. An organization must strategically identify all of the pitfalls that can potentially occur *at the beginning* of a migration project. Define the full scope.

Managing migration projects of any size demands many stakeholders and numerous decisions that must be made strategically and with the best of intentions. If these crucial steps are ignored, it can easily trigger a sequence of regrettable future events.