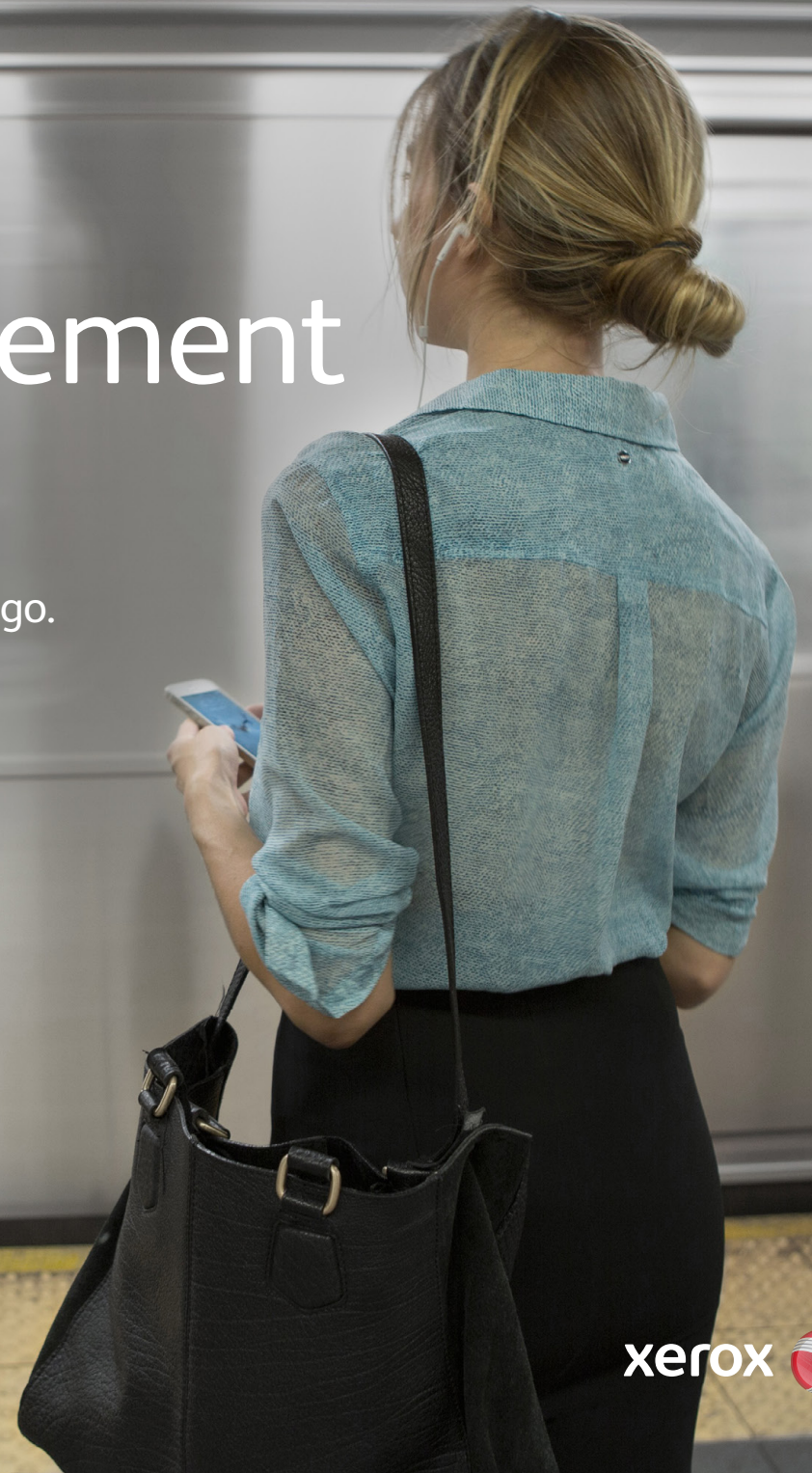# Document Management for Road Warriors

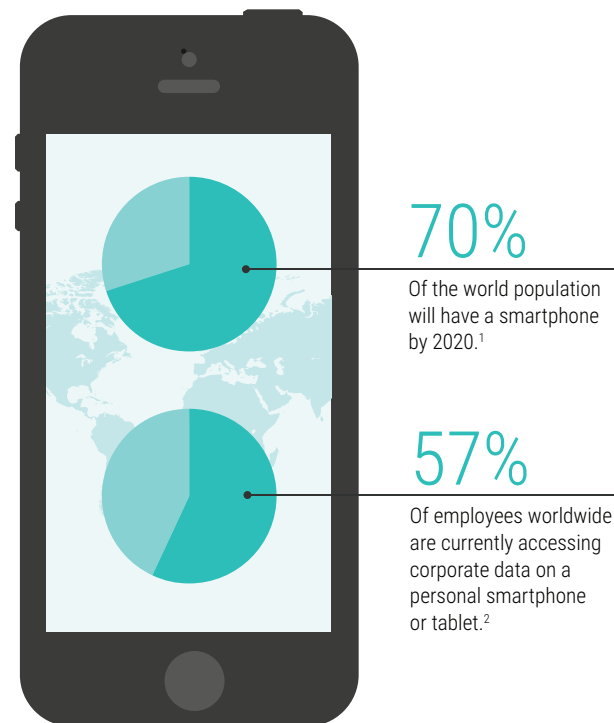How to move information when your team lives on the go.

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New needs for a brave new world.

There are now more mobile devices in the world than people, meaning the way we live – and consequently the way we work – is changing radically.

Despite the newfound freedoms of cell phones, anything beyond casual communication is hard when you're constantly on the go. The promise of work-from-anywhere mobility lets us email from the airport and take calls from the car, but that convenience often comes with added complication. So, it's absolutely vital that the way mobile work happens is push-button simple. Workflows need to be reduced to the smallest number of steps for maximum efficiency. Mobility means nothing if there are breakdowns in flow and collaboration because your process is too hard.
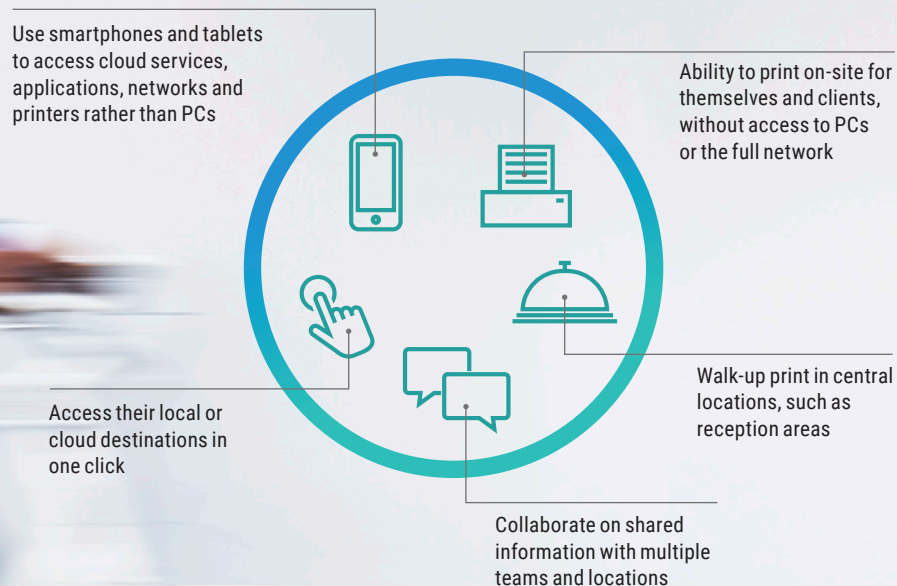
Profile of today's mobile worker:

- Has a primary office, which may be a home office, but also works elsewhere

- Travels to company, customer, and vendor facilities—locally, nationally, and internationally

- Spends the majority of an average day in meetings—in person, on video, or by phone with screen sharing

- Interacts with people in multiple locations and time zones over email, video, and instant messaging

70%
Of the world population will have a smartphone by 2020.[1]

57%
Of employees worldwide are currently accessing corporate data on a personal smartphone or tablet.[2]

[1]Ericsson Mobility Report on the Pulse of the Networked Society. June 2015.
[2]Beyond BYOD: How Businesses Might COPE With Mobility. Ovum, May 2014.

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How today's mobile worker wants to manage documents…

Use smartphones and tablets to access cloud services, applications, networks and printers rather than PCs

Ability to print on-site for themselves and clients, without access to PCs or the full network

Access their local or cloud destinations in one click

Walk-up print in central locations, such as reception areas

Collaborate on shared information with multiple teams and locations

…and what they need to get the job done.

Your mobile worker may enjoy the freedom that comes with mobility, but they still have expectations. He or she is used to a "hard-wired" office experience where needs are met instantaneously when emailing files, scanning or printing out confidential documents. Being mobile doesn't change that; mobile workers require their technology to integrate seamlessly with the mobile devices and the cloud apps they're now using regularly to get their work done.

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Making mobility work for you and your team.

Mobile workers need to do what their peers do at their desks — just with phones or tablets in a crowded airport. Forms need to be filled out, contracts need to be signed and/or documents need to be reviewed, approved and filed. This requires an infrastructure to integrate seamlessly with the mobile devices and cloud apps mobile workers are using. Your success hinges on being able to create a mobile and cloud environment where the processes support not only mobility but collaboration between all team members — those in-house and those far afield. The flexibility and freedom of mobile and the cloud can and should let your team work the way they need to.

Cloud storage services such as Dropbox and productivity tools such as Google Apps for Business and Microsoft Office 365 offer smarter ways to collaborate, communicate and scale as companies grow. And the benefits are more than abundant: faster and easier access to documents and information and better communication for both mobile and onsite team members, resulting in increased productivity.

In this eBook we'll feature two mobile work scenarios that spotlight the nature of mobile working to demonstrate how easily information and collaboration can flow outside the office.

"The era of the PC has ended. Employees are becoming more mobile and looking for ways to still be connected wherever work needs to be done."

—Phil Redman, Research Vice President, Gartner

62%
Of employees work in multiple locations.[3]
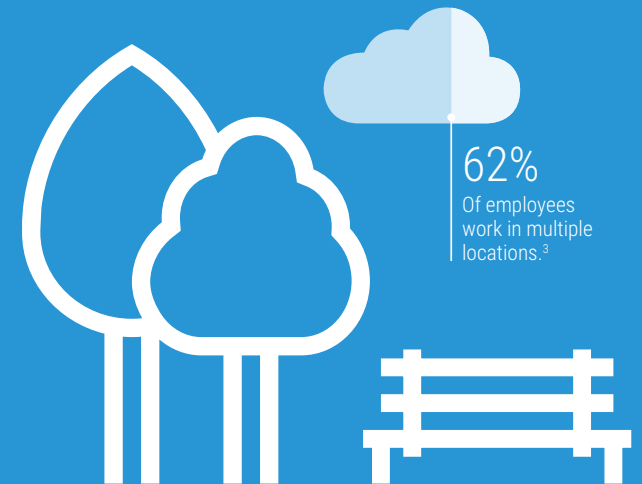
[3]Forrester, "Provisioning a Flexible Workplace Pushes the Boundaries of IT and Drives a Search for Outside Help," June 2012.

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Giving real estate workers their space.

Real estate is a field that requires workers to be in perpetual motion. Properties are not static nor are the people buying and selling them. Agents on both ends of the deal require 100% connectivity and nothing less to ensure access to the people and information they need to seal the deal from any location and any time of the day.

The Situation:

In many cases, regulation requires that agents file a hard copy record of the customer Property Disclosure statements to access from various branch locations. But the paper filing process is manual, time consuming, prone to error and limits access – making it difficult to share client files.
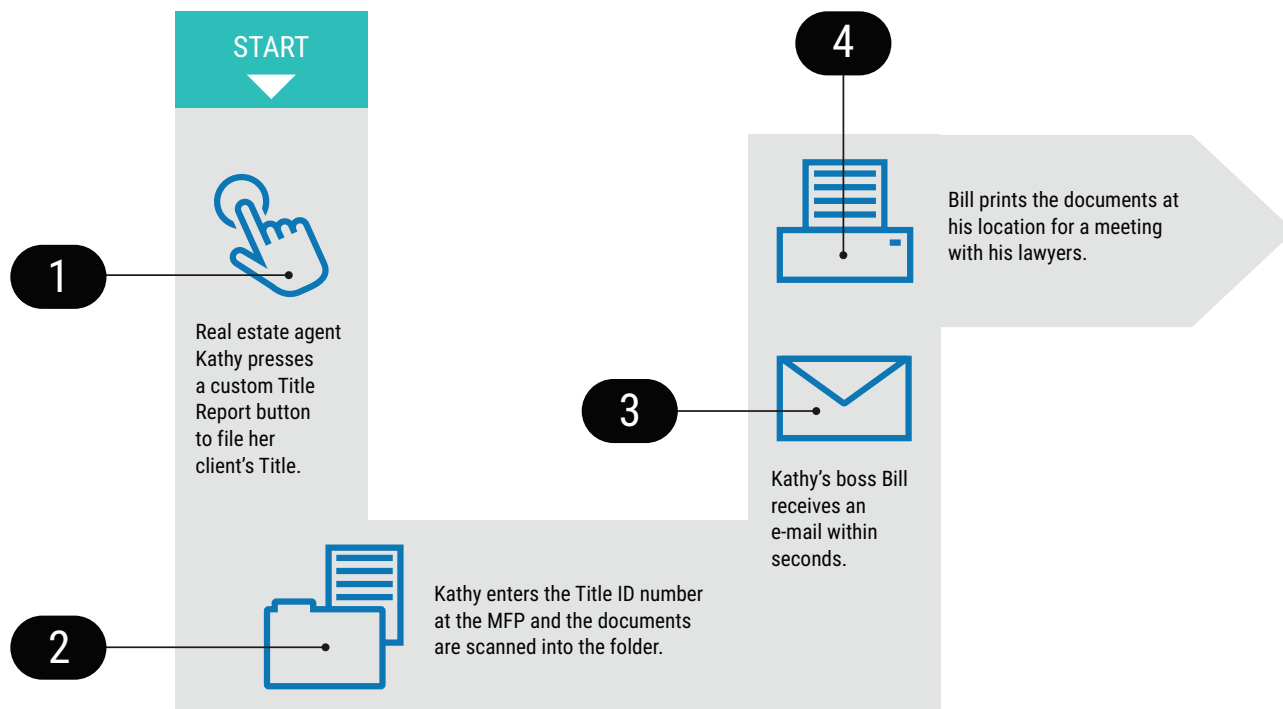
The Solution:

Agents can create an electronic filing with email notifications via a customized multi-destination scan app on the Xerox® multifunction printer (MFP). The electronic docs can be sent to a dedicated folder on the network or in the cloud for each client listing, with the option to enter the customer Property Disclosure ID as a filename and the email recipient.

New mortgage regulations require more documents than ever – an average loan file can be up to 2,000 pages – so the process needed to handle them must be responsive and seamless.

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Giving real estate workers their space.

START
▼

1 — Real estate agent Kathy presses a custom Title Report button to file her client's Title.

2 — Kathy enters the Title ID number at the MFP and the documents are scanned into the folder.

3 — Kathy's boss Bill receives an e-mail within seconds.

4 — Bill prints the documents at his location for a meeting with his lawyers.

The Outcome:

- Digitized workflow increased productivity while reducing errors for real estate agent

- Timely notifications via email for intended recipients and co-workers decreased the time to closing

- Met regulatory requirements

This mobile workflow situation modeled a seamless business transaction. The technology was in place to respond to the agent's situation and challenges, supporting the necessary document storage and sharing needs.

Poor document processes lead to significant business risk.[4]

[4]International Data Corporation, June 2012.

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All together now: remote team collaboration.

Even with digital solutions, more than a third of processes are document driven. That means integrating paper-based processes with your mobile and collaborative solutions is mission-critical to your business. Effective collaboration means projects are moving at the speed competitive business requires: papers are quickly delivered to email boxes and documents that need to be signed are printed on time. Everyone is on the same page and the synergy is flowing.
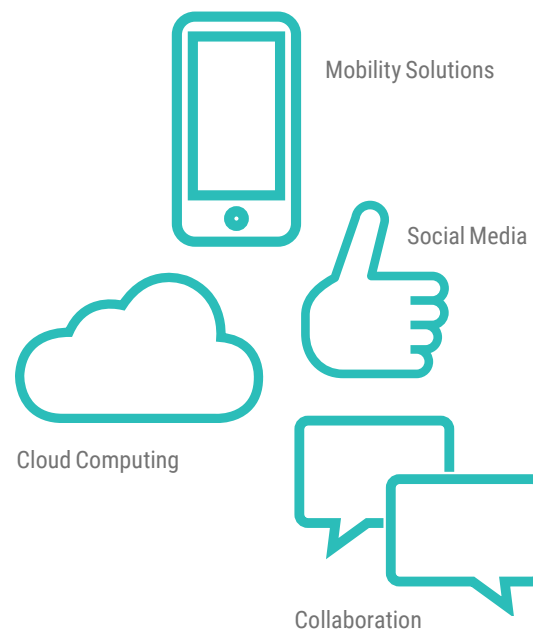
The Situation:

Project team members in different offices around the world are using Office 365 to store project documentation that starts in a hardcopy format. To make quick decisions, team members need immediate access to project files with the ability to search on specific topics and find information stored by other team members.
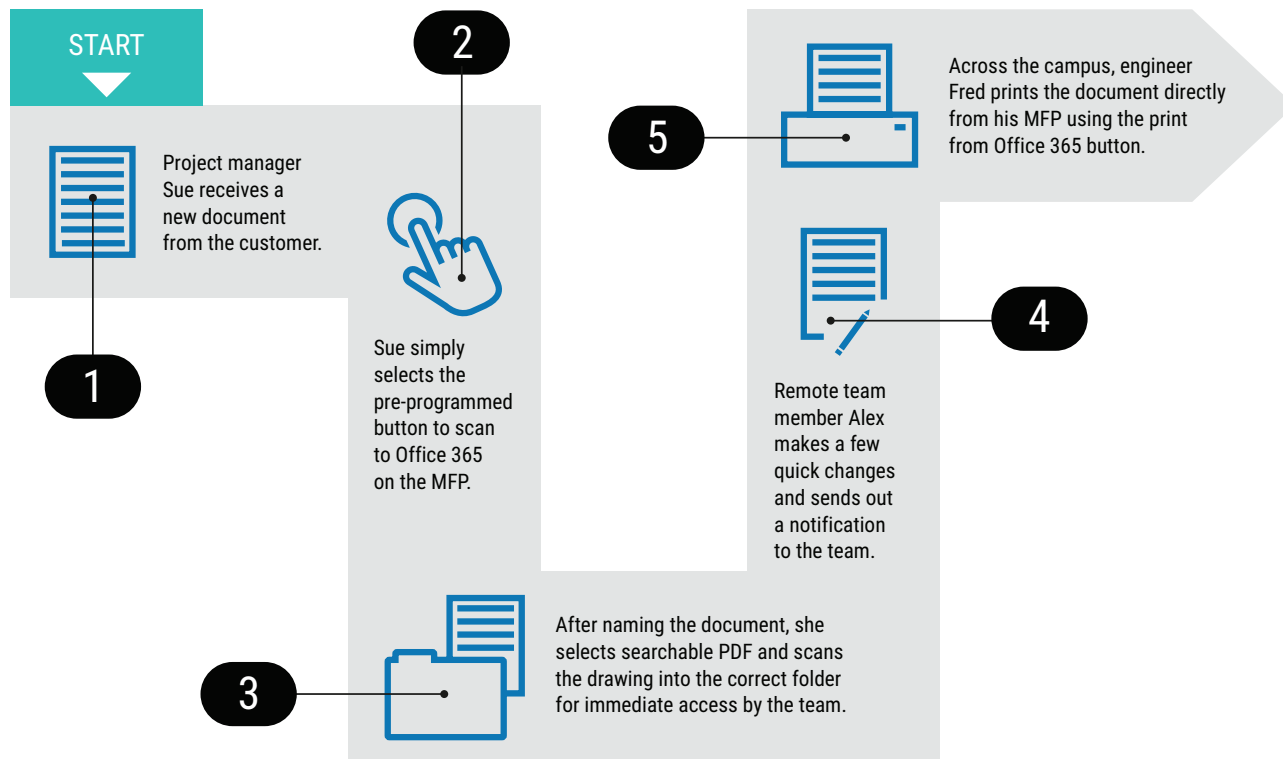
The Solution:

Documents are now scanned at the MFP with unique identifiers and stored in folders linked to each project team. Now team members simply swipe a badge at the device and they will be connected to their respective folder in Office365. The project files are conveniently stored in a searchable PDF format enabling full text search functionality. The documents can also be printed from the team folders via mobile devices.

4 Highest SMB Priorities[5]

Mobility Solutions

Social Media

Cloud Computing

Collaboration

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All together now: remote team collaboration.

START

1 Project manager Sue receives a new document from the customer.

2 Sue simply selects the pre-programmed button to scan to Office 365 on the MFP.

3 After naming the document, she selects searchable PDF and scans the drawing into the correct folder for immediate access by the team.

4 Remote team member Alex makes a few quick changes and sends out a notification to the team.

5 Across the campus, engineer Fred prints the document directly from his MFP using the print from Office 365 button.

The Outcome:

- Project team met deadlines
- Increased team productivity, collaboration and satisfaction
- Assured project files were accessible in digital format

This mobile work situation embodied seamless team work where there were no silos to penetrate and communication was optimum.

IDC estimates that the overall cost of broken document processes is at least 10 times the direct out-of-pocket costs for a company in terms of fines, lost customers, lost employees, PR crises, and data breaches.[6]

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Make your mobile work force a force to be reckoned with.

When printing and scanning are a part of every working day for your mobile team, you want those tasks to be fast, intuitive, and push-button simple.

Getting your workflows set up to make your documents work best for you is key. Through customized apps on the MFP front panel or cloud-connected mobile print options that let you print from anywhere, Xerox can help.

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About Xerox

Xerox is helping change the way the world works. By applying our expertise in imaging, business process, analytics, automation and user-centric insights, we engineer the flow of work to provide greater productivity, efficiency and personalization. We conduct business in 180 countries, create meaningful innovations and provide business process services, printing equipment, software and solutions that make a real difference for our clients — and their customers.

Learn more at xerox.com

WORK CAN WORK BETTER™