

Digital Document Management: The Modern Panacea

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Abstract

This White Paper will change your business. Reading it will help you understand why your staff struggle to manage the volume of information they have to deal with. It will also provide your business with a viable, cost-effective solution to this problem. This solution will change the way you manage information within your business. It will change the behaviour of your staff. It will generate you more time, more space and more profit. It will do this quickly and easily. But first let's take a trip back in time...

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1. The Problem

Imagine you are living in the Pleistocene era about 150,000 years ago. Your brain is basically the same as it is now but your way of life is very different indeed. Most days are spent wandering the savannah in search of food. Sometimes these hunting trips can last for days and are often unproductive. You know that the world is full of scarcity and your brain has learnt to adapt to hunger. The land you trek across has been familiar to your ancestors since time began and the few people in the world that you know are connected to you through a network of kinship. Above all, little changes in your world and the amount of new, irregular information you have to process is very small. So far, so good. Except one day as you cast your eyes into the distance looking for the minute changes in the landscape that might indicate the presence of predator or prey, you notice something remarkable. At first the change is small but gradually it gets bigger and bigger until the horizon is full of people. Vast numbers of them. More than you ever imagine existed. You're scared. Your brain is screaming at you, 'Danger! Danger! Run! Run!' The problem is they're all around you and there's no way out. You prepare to stand and fight but when they approach, they tell you all they want to do is to connect to you. About ten thousand of them even call themselves your friends and talk about a brave new world called 'Facebook' and 'Bebo', where everyone is everyone else's friend even when they don't want to be. Each one of the countless people that now surround you is shouting and clamouring for your attention. They all scream of a world of so much abundance that you don't have to hunt or go hungry. The din of so many voices is so great that you cover your ears but even then you can't shut them out. You fear you will never hear the quiet rustle of grass on the savannah again as your brain begins to fry.

1.1. Fight or Flight?

We haven't yet evolved to cope with 21st Century information flow. By the time we do it will probably be too late. The problem is that we are conditioned to cope with any stress or threat to our well-being by tackling it head on or by running away. We know the symptoms: our hearts beat faster and our pupils dilate as adrenaline rushes through our body and we choose whether to fight or fly. But what happens if we can't take either of those two options – if the environment we find ourselves in demands that we stay rooted to the spot? Our cognitive functions begin to implode and our immune systems become depressed as our resistance to the world around us weakens.

Take a look at the scale of the problem: our Pleistocene ancestors got by without any written information at all and only a handful of well-rehearsed myths. Even as recently as 1456, the world's printed matter amounted to just 60 Guttenberg Bibles. However, the invention of the printing press meant that by 1500 there were over 15 million books in print, and today we process over 3,000 sales messages and collectively send about six trillion business emails *every single day*¹. More new information has been invented, delivered and processed since 1980 than in the previous 5000 years².

1.2. The Magical Number

Part of the problem is the limited capacity of our conscious minds to process information. In 1956 a cognitive psychologist by the name of George Miller conducted a series of experiments that resulted in one of the most famous academic papers in modern psychology: *The Magical Number Seven, Plus or Minus Two*³. He sought to address the problem of our capacity to understand and transmit information and he came to the conclusion that our conscious minds could only process seven, plus or minus two, chunks of information at any given time. While there has been much debate both about his specific conclusions and about exactly what constitutes a chunk of information, it is generally accepted that our conscious information-processing capability is very limited and totally inadequate for coping with the demands of modern information flow. In business, our time is constantly interrupted and we become

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progressively less efficient as our cognitive capabilities fight an endless and losing battle simply to keep afloat in the oceans of information we have to deal with. Just think: it takes an average of four minutes for us to refocus ourselves after being interrupted by a single email⁴. What, then, is the effect of 10, 20, 30 or 100 such interruptions every day?

Overwhelming our conscious minds with information, while simultaneously blocking our fight/flight response to the consequent sense of threat to our psychological and physical safety, drives us into making poor decisions based on much less information than we need to make good decisions. The systemic stress that has become the staple of our working life means our short cuts are shorter than they should be. The psychologist Robert Cialdini captures this dilemma when he writes that “we have created an environment so complex, fast-paced and information-laden that we must increasingly deal with it in the fashion of the animals we long ago transcended”⁵. And the animals he’s talking about aren’t our Pleistocene ancestors – they’re turkeys!

1.3. Infomania

It’s easy to slip into the trap of seeing ourselves as victims in all this: ‘if only all these people would stop hassling me I might get some work done!’ The problem is, there’s a large part of our brains that loves it: we just want more and more information, whatever the consequences might be. The neuroscientist, David Lewis, stands at the forefront of the arms race between marketing agencies (the makers of weapons of mass information) and their targets (you and me). In developing the field of neuromarketing, he is convinced that we will need to increasingly tailor our messages to the specific ways in which our unconscious minds are programmed⁶. But it would be a mistake to assume that we are resistant to receiving this information. Many commentators point out that we are resistant to receiving *irrelevant* information, but all too often we misunderstand this to mean we are resistant to information *per se*. In fact, the opposite is very much the case. In the Pleistocene era, where new information could mean the difference between life and death, hunger or satiety, having an insatiable desire for new information was useful to us. Now that most of us in the industrialised world are neither hungry nor walking a daily survival tightrope, our brains are still built to seek out new information. So just in case we miss out on some vital piece of information, we obsess about our emails, texts and social networks as if our lives depended on it. That’s what Lewis calls ‘*infomania*’.

So we crave the very stuff that makes us sick. Just as we reel under the weight of too much information we ask for more. The cost to us, personally and professionally, is enormous. In the workplace, our productivity decreases in direct proportion to the progressive loss of space and time that results from our voracious appetite for information. And while we turn to food, drugs, psychotherapy and football as an antidote, we fail to realise that we are doing all this to ourselves – and we neither want to nor are able to stop.

1.4. Office Ailments

Which brings us to the modern office. Marketing and psychology experts have identified three behavioural disorders which afflict the average office worker: *Information Disorder*, *Decision Dysfunction* and *Overactive Circulation*. Collectively termed ‘Office Ailments’, these conditions are currently being researched further with contributions being made from offices throughout the UK, and clear patterns and pathologies are emerging. The statistics which illustrate the effects of these disorders are breathtaking: £12.8 million working days were lost through stress in 2004/5 at a cost to UK business of £3.7 billion a year⁷.

Information Disorder is one of the most prevalent behavioural conditions. It afflicts significant numbers of the modern office workforce and is characterised by feelings of being overwhelmed and unable to

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cope. It often causes sudden outbursts of anger, leads to irrational, overstated arguments with work colleagues and is almost always linked in its more progressive manifestations to *Decision Dysfunction* which, as the name suggests, leads to a complete breakdown in our ability to make commercially meaningful and useful decisions. In effect, our brains become clogged up with pieces of information that no longer function as discrete units, but collapse one into the other into a foggy mulch. *Overactive Circulation*, while a condition in its own right, is essentially a failed coping mechanism for this damaging state of affairs. By excessively pressing the literal and metaphorical 'send' button (i.e. by circulating and endlessly recycling information) we act in the belief that we are at least doing *something*, that our actions are focussed and that our repeated failure to communicate or to get the outcomes we want is simply the fault of others' inability to listen to or understand basic information. The reality, of course, is that we are becoming infantilised. Incapable of taking responsibility either for the quandary we find ourselves in, or for the way in which office ailments are heaping professional economic damage upon personal disorientation, we simply let business pick up the tab.

2. Digital Document Management: The Modern Panacea

What is to be done? The scope of this paper is to look at Digital Document Management (DDM) as a possible solution to the commercial impact of information overload. It has the capacity to change behaviour, increase productivity and relieve the symptoms of all office ailments.

Essentially, DDM is a way of managing and distributing information electronically in such a way as to give back to business much of the time, space and money it has lost over the last twenty years. As such, it has the potential to transform commercial performance and make the workplace a better, more productive place to be. 'Potential' is, of course, the key word here. There are many DDM applications on the market. In order to turn potential into reality, DDM has to be able to get the support from business owners, financial directors, operations managers and multiple levels of user. The only way this support will be forthcoming is if the application is built to a highly flexible specification enabling it to be tailored to meet specific business needs, if the interface is intuitive, if the training required is minimal and if the price can guarantee a return on investment within a relatively short timescale.

One of the most successful and fastest-growing DDM applications in Europe is Series 6 from Invu, a Microsoft Gold Certified Partner. Accredited by the ICAEW, BASDA and SAP, integrated with IRIS Practice Management software, marketed and bundled by Sage as an OEM product for the accountancy and professional services market and supported by a vast, Accredited Partner network, Series 6 has over 63,000 users worldwide and remains the DDM application of choice for businesses of all sizes. Built with the proactive input of representatives from market sectors as diverse as accountancy, law, manufacturing, education, PR and finance, it empowers our cognitive capabilities by simplifying the information we have to deal with, clearly differentiating between types of information in commercially useful ways, managing information to enable effective decision making and connecting users to information in ways that create a clear basis for future action. It puts us back in control of information and allows us to run our own brains. So what effect does it have on the Office Ailments?

2.1. Information Disorder

Invu Series 6 immediately imposes order on the mass of information we crave but struggle to process daily. It stores documents and communications together, regardless of their original format, in one central, easy-to-access hub. That means computer files, created in a variety of different programmes, can be stored alongside emails, attachments and digital copies of physical documents – faxes, delivery notes, receipts, plans, drawings – whatever paperwork you routinely handle.

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The result is a clear and organised working environment. No more bulky, over-stuffed filing cabinets, desks littered with piles of dusty paper, forgotten rooms filled with anonymous archive boxes or shelves which groan under the weight of a hundred files. Imagine instead space in which to think and work productively, clean surfaces, every corner exposed to natural daylight. Which would you prefer to see? The calming green fronds of leafy plants, gently releasing oxygen into the atmosphere, absorbing toxins and creating a general feeling of wellbeing; or angular, grey, industrial filing cabinets that clunk and squeak on every opening? A spacious, pleasant working environment is an instant antidote to the energy-sapping effects of Information Disorder, and a better match for the landscapes our brains evolved to work best in.

2.1.1. *Coping with abundance*

The feeling of being overwhelmed by information reduces proportionally with the de-cluttering of our physical space. But Series 6 also delivers something we've never had before: a means to navigate that information quickly and easily so we can instantly find what we're looking for. Just think about that for a second. Series 6 enables you to locate and retrieve any piece of information your company holds, virtually instantaneously, from the security and comfort of your desk and all in return for the effort invested in a couple of mouse clicks. No confusion, no anxiety, no compulsion to run. And whether you search by file name, by subject, or by the merest snatch of content you're *pretty* sure you remember seeing, although in what context you have no idea; you'll find what you're looking for, and all related information, to view, amend or share. As such, Invu makes abundance work for us rather than against us by creating the time and space to enable us to control it.

2.1.2. *Cutting down what we ask of our brains*

Overcoming Information Disorder is about managing the demands we make of our cognitive capabilities by making information easily accessible. Because everything is kept digitally and centrally, Invu Series 6 completely eliminates the risk of documents being mislaid, misfiled or deleted. How many times have you hunted for a file at work, blaming colleagues, imagining some company-wide conspiracy, only for the realisation to dawn that the last place you saw it was on the breakfast table at home? Have you ever come back from a holiday to find your desk drawers in upheaval – the result of some frantic colleague's fruitless search for missing papers? These are the daily irritations and headaches that raise our hackles and our blood pressure and keep us awake at night. They're the result of juggling too many pieces of information – far more than Miller's magical number seven. They're the key contributors to Information Disorder, which DDM eliminates.

2.1.3. *Calming the 'fight or flight' instinct*

The key requirement of a cure, of course, is that it delivers relief from the diagnosed complaint without creating problems of its own; that there should be no unwanted side-effects. In DDM, that means addressing the stress caused by traditional filing methods without adding extra burdens or new fears. In this regard, Series 6 is unique. It's secure storage and extraordinary search capabilities are delivered via the most intuitive interface available. All staff – regardless of the level of their computer skills – will find the navigation familiar and instinctual. The idea is to stop making demands of ourselves which are against our nature, and to work in a way which appeals to our creative, right-brain cognitive ability.

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2.2. Decision Dysfunction

Series 6 gives us the tools to take control of the information we crave and to trust in our cognitive abilities. Where conventional filing methods combined with modern communication channels left us feeling hopelessly awash in a sea of information we could never fully absorb, Invu's document management reins it in and puts everything where we can see it.

2.2.1. *Making our Infomania work for us*

No longer will we feel ill-equipped to make a decision, for fear of having missed some critical update or communication – a search on Invu will show us everything there is to see about a particular project or client, satisfying our need for knowledge, presenting it in a manner we can handle and freeing us from the paralysis which inhibits our decision-making skills.

How will this make a practical difference to your working day? Let's look at a scenario. The phone rings. You answer it, only to find the caller has been directed to you by mistake. They're a customer – an important one – but what they're looking for isn't strictly within your remit. Without Invu, the only options are to redirect the caller again and pass the problem to someone else, or to take their details, promise a call back, and interrupt your working day to chase the information they need. With Invu, however, that information can be retrieved from your desktop. Call up their details, see the latest documents and communications at a glance, and be confident that the information you give them is accurate – all within a few seconds. What's more, the Invu feature 'CodeFree Integration' allows you to conduct the search from whichever application you're working in – simply drag and drop the Invu icon over the words you want to search by, and Invu will do the rest. The result? A happy customer, and minimum disruption to your flow of concentration.

2.2.2. *Creating a landscape in which small changes can be noticed*

On a larger scale, the clarity DDM delivers to a business allows commercial decisions to be made more accurately. It highlights inefficiencies in company processes, ensures the most up-to-date information is always at hand, and provides security in the knowledge that company intelligence is protected. This allows managers to be more proactive; lifting them from the minutia of daily procedure and encouraging forward planning. By enabling us to see the detail clearly, Invu Series 6 exposes previously obscured paths for growth and development.

2.2.3. *Learning from experience – survival of the fittest*

Input from our customers and industry over the past decade has helped to evolve Invu Series 6 into the most adaptable and versatile DDM product yet; one which can be tailored to suit your organisation. Invu understands the particular needs and requirements of different sectors, ensuring that this clarity is delivered to everyone, helping personnel in all professions to feel confident about their ability to assimilate knowledge and to have faith in the decisions they make.

2.3. Overactive Circulation

Overactive Circulation: the condition which compels us to endlessly duplicate and disseminate information as a compulsive reaction to stress. Forwarding information is easy and makes us feel as though we're contributing, but the consequence is the perpetuation of the constant bombardment we all endure. Every email which arrives demands attention, every unread attachment adds to the

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growing sense that we simply can't keep up, and server memory is needlessly depleted through storing several copies of the same file. The problem is so great that some companies in the United States are trialling techniques to curtail incessant forwarding; penalising personnel for sending redundant communications and introducing 'email-free' days.

2.3.1. Tackling our compulsive behaviour

Invu removes the perceived need to continuously forward emails, or to save the same files in different places and formats. One digital copy can be held on the central system for all to access and view simultaneously. Built-in version control means changes are tracked automatically – invaluable for engineers or designers who require a record of a project's process, but just as useful for administrative staff who update records regularly.

2.3.2. A more reliable coping mechanism

Audit trails are automatically and accurately recorded, enabling users to track who has seen what. No more launching documents off into the ether, with no idea if they've actually been read. This is controlled and efficient use of the incredible resources that have only recently become available to us. It replaces the 'scatter-gun' approach to sharing information – a coping mechanism we all seemed to develop in response to information overload, but one which adds to the problem more than it alleviates it.

2.4 The Commercial Result

Cured of our office ailments and their often debilitating symptoms, we are collectively and independently happier, and, as a result, more productive.

Time saved on the detail allows more scope for big thinking, for the proactive pursuing of ideas, for dynamic problem solving. Space saved from storing physical files makes costly off-site storage redundant and gets more value out of office space. Compliance becomes simple; audits take hours instead of days. Business procedures are streamlined for maximum efficiency. Typically, companies can expect to achieve return on investment in less than 6 months.

And that's before the effects of greatly enhanced response times are counted. In today's increasingly crowded market places, customer service is sometimes the only differentiator between companies. Invu Series 6 delivers timely, accurate intelligence, impressing clients and boosting the confidence and capabilities of staff – all of which makes a difference to the sustainability of the business environment within which we work.

3. Back to the Savannah

Office ailments cost the UK economy billions a year, and the International Labour Organisation estimates the total cost to be as high as 10% of Britain's Gross National Product⁸. With Invu Series 6 we recover the time and space that modern communications have so comprehensively eroded. Take a moment to imagine what your business would be like if the information your staff processed was always relevant and easily accessible. By freeing our brains to work as was intended, Invu allows us to hunt, gather and distribute information in ways that enhance our working lives. In enabling us to use our cognitive capabilities more effectively, Invu Series 6 empowers us to connect to information and to each other in more profitable ways.

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What now?

To contribute to ongoing research, please take a moment to complete our online questionnaire at www.officeailments.com. The test, which takes less than two minutes to complete, will help you find out the extent to which the office ailments described are affecting you.

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