Digital Document Management and Paperless Office Training Course

23 - 27 Nov 2026

Casablanca

4500 € (Per Person)

Ref: #PRO6988_279650

Course Introduction / Overview:

The transition to a paperless office is a cornerstone of modern digital transformation, offering unparalleled gains in efficiency, security, and sustainability. This course provides a comprehensive roadmap for organizations aiming to replace traditional paper-based workflows with streamlined digital document management systems. It moves beyond basic scanning techniques to cover the entire document lifecycle, from creation and capture to secure archiving and compliant disposal. We will explore the strategic frameworks necessary for successful implementation, drawing on principles from information science experts like Dr. Geoffrey Yeo, who has contributed significantly to modern records management theory. Participants will learn to design and implement robust document control procedures, automate workflows, and ensure regulatory compliance. This program, offered by BIG BEN Training Center, is designed to be intensely practical, referencing concepts from works like "The Paperless Office: How to Create a Digital-First Workplace" to equip attendees with the skills to lead their organizations toward a more agile and efficient future. This is not merely about reducing paper; it is about re-engineering information flow to unlock an organization's full potential.

Target Audience / This training course is suitable for:

- Administrative Managers and Staff.
- IT Professionals and Systems Administrators.
- Records Managers and Archivists.
- Compliance Officers and Legal Professionals.
- Operations Managers and Team Leaders.
- Project Managers leading digital transformation initiatives.
- Executive Assistants and Office Coordinators.
- Anyone involved in document handling and information management.

Target Sectors and Industries:

- Financial Services and Banking.
- Healthcare and Medical Institutions.
- Legal Firms and Corporate Legal Departments.
- Government Agencies and Public Sector Organizations.
- Engineering and Construction.
- Educational Institutions.
- Pharmaceutical and Research Companies.
- Manufacturing and Logistics.

Target Organizations Departments:

- Human Resources.
- Finance and Accounting.
- Legal and Compliance.
- Administration and Operations.
- Information Technology (IT).
- Procurement and Supply Chain.
- Customer Service.
- Quality Assurance.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop a strategic plan for transitioning to a paperless environment.
- Implement effective digital document control procedures.
- Master techniques for document scanning, OCR, and metadata tagging.
- Design and manage automated digital workflows for improved efficiency.
- Ensure the security and integrity of digital documents and records.
- Apply best practices for document version control and lifecycle management.
- Establish compliant document retention and disposal policies.
- Lead change management efforts to ensure user adoption of new systems.
- Evaluate and select appropriate document management system (DMS) software.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be immersive, practical, and highly interactive, ensuring that participants not only learn the theory but can also apply it directly to their professional roles. This course utilizes a blended learning approach that combines expert-led presentations with hands-on exercises and real-world case studies. Participants will engage in group discussions to analyze challenges and brainstorm solutions for paperless office implementation. Practical workshops will allow them to work with document management concepts, such as designing a digital filing system and mapping a workflow for automation. We emphasize a collaborative environment where attendees can share experiences and learn from one another. Our instructors facilitate sessions that encourage critical thinking and problem-solving, moving beyond lectures to become true learning partnerships. Continuous feedback is provided throughout the course to help participants build confidence and master the skills needed to drive digital document management initiatives within their organizations. The focus is on building tangible capabilities that deliver immediate value.

Course Agenda (Course Units):

Unit One: Foundations of the Modern Paperless Office

- Introduction to digital transformation and the paperless concept.
- Assessing the costs and benefits of going paperless.
- Understanding the difference between DMS, ECM, and ERM systems.
- Key principles of effective information governance.
- Identifying common challenges and pitfalls in paperless transitions.
- The role of document management in business process automation.
- Building a business case for a paperless office initiative.

Unit Two: Digitization, Capture, and Indexing Strategies

- Best practices for document scanning and imaging.
- Leveraging Optical Character Recognition (OCR) for searchable documents.
- Developing a robust metadata and taxonomy strategy.
- Techniques for effective document indexing and classification.
- Managing document capture from various sources (email, forms, mobile).
- Quality control processes for digitized records.
- Understanding file formats and long-term preservation standards.

Unit Three: Mastering Digital Document Lifecycle Management

- Defining the stages of the document lifecycle from creation to disposal.
- Implementing robust version control systems and protocols.
- Designing and automating business workflows.
- Establishing clear document review and approval processes.
- Strategies for secure digital archiving and data storage.
- Developing and enforcing document retention and destruction schedules.
- Managing both structured and unstructured data effectively.

Unit Four: Ensuring Security, Compliance, and Information Governance

- Fundamentals of digital document security.
- Implementing role-based access controls and permissions.
- The legal validity of electronic signatures and records.
- Navigating regulatory compliance (e.g., GDPR, HIPAA, ISO standards).
- Conducting risk assessments for digital information assets.
- Best practices for data encryption and secure document sharing.
- Creating an audit trail for document access and modifications.

Unit Five: Strategic Implementation and Change Management

- Developing a phased implementation project plan.
- Criteria for selecting the right document management software.
- Strategies for data migration from paper and legacy systems.
- The critical role of change management in user adoption.
- Designing and delivering effective user training programs.
- Measuring success with key performance indicators (KPIs).
- Future trends in document management and artificial intelligence.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

Beyond cost savings and efficiency, what are the deeper cultural and ethical implications of an organization's complete transition to a paperless, data-driven environment?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by adopting a holistic, strategic framework that integrates technology, process, and people. While many programs focus narrowly on the technical aspects of specific software, our curriculum emphasizes the development of a comprehensive information governance strategy that serves as the foundation for a successful paperless transition. We delve deeply into the practical challenges of implementation, dedicating significant time to change management, user adoption, and workflow re-engineering, which are often the primary points of failure in such projects. The content is built around real-world case studies and problem-solving workshops rather than passive lectures, ensuring participants can directly apply their learning. Furthermore, the course content is grounded in established academic principles of records and information management, providing a level of intellectual rigor that goes beyond a simple feature-by-feature software tutorial. Participants will leave not just with technical knowledge, but with the leadership and strategic planning skills required to champion and execute a successful digital document management initiative from start to finish.