DOCUMENT MANAGEMENT
BUSINESS NEEDS ASSESSMENT

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In order for an organization to properly implement and utilize a Document Management solution, it must understand the "why" behind the potential purchase.

More than searching for a vendor that offers X, Y or Z, it is important to look for a solution that can solve your business problems. In many cases, an organization will task an employee with identifying and cataloging multiple vendors without understanding the overall need or push for this type of solution.

It is imperative that the business answer the following questions before moving forward with the overall selection of vendors. This checklist will help set the priorities and goals of your organization moving forward as well as help uncover some of the inefficiencies that are going to be drivers for adopting the solution.

Needs Assessment

Ask yourself, "What has made our organization look at implementing Document Management? What problems are we trying to solve?"

- ☑ There have been legal costs associated with lost documents

- ☑ It has taken significant manpower to find documents for litigation purposes

- ☑ Your organization must improve its disaster recovery procedures

- ☑ You have industry or governmental regulations that are required in order to sustain your business within proper compliancy measures

- ☑ Your organization suffers from process inconsistencies

- ☑ Customer service has suffered due to the inability to locate critical information

- ☑ You experience errors or inaccuracies due to manual data entry

- ☑ There are consistent delays in completing work due to process bottlenecks

- ☑ Storing paper and documents is becoming increasingly expensive and/or is consuming an increasing amount of space

- ☑ Your company is dependent on paper for over 90% of our business

- Paper processes are bogging down production and forcing staffing levels to increase just to manage menial duties such as data entry

- Critical business documents are difficult to manage and organize, and extensive time is required to locate files and paperwork

- There are security concerns not effectively being addressed

- Staff has unnecessary and unsafe access to confidential employee and client information because there is no efficient way to protect this information

- Staff is constantly challenged with the need to share information. This often results in unnecessary emailing, faxing, and printing

- Field workers require access to information but have no way to obtain it without redundant emails/phone calls/ trips to and from headquarters

Other Key Considerations

What do users, mangers and key stakeholders need the system to do?

Is your company looking for a hosted solution (SaaS) or an on-premise solution?

Is your organization looking to adopt a company- wide solution or is it a single department that is taking on the initiative?

Does your company have an existing document management solution that is not being utilized or has significant problems?

Are there line of business systems the Document Management software must integrate with?

The Results

After implementing our solutions, Goodwill Industries of Middle Tennessee was able to eliminate a room full of filing cabinets, reduce time spent on paperwork by 25% and ultimately save over $100,000 a year.

What would that mean to your organization?

ABOUT IDATIX

With deeply integrated document management and process automation software solutions from iDatix, organizations such as Goodwill Industries, Lockheed Martin and Morton Plant Mease Hospital have met their objectives by streamlining their processes and simplifying their workplace.

With our technology, organizations have been able to eliminate paper and unnecessary costs while allowing them to do more work with the limited resources available.

Our goal is to help overburdened companies gain greater control over their operations. By integrating with your existing systems you can expect dramatic improvements in efficiency and productivity.

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