DocuWare
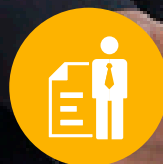
In Five Steps –
How to Successfully Introduce
Document Management

Roadmap

With DocuWare, your company can quickly and securely benefit from digital document management

We here to help, from beginning to end: from identifying your needs to detailed planning to seamless implementation. Through employee training and technical support, we fortify every step of the way.

Step 1: Orientation

Initially, it is important to clarify what benefits your company hopes to enjoy by introducing a DMS. This might include improving operational processes, saving expensive office space and easier compliance with legal requirements.

The parts of your company which are heavily document-based such as Purchasing, Sales, Accounting or Personnel – where lots of paper makes the rounds or response times seem the slowest – are excellent candidates. Begin by recording which departments, what documents and processes would be affected. Our Solution Finder can also help you figure it out.

For general guidance, we recommend the video „What is Document Management?" Then contact the DMS provider of your choice. A qualified sales consultant will develop a solution tailored to your needs.

Step 2: Client Presentation

After the Orientation Phase, you now have a general sense of which areas will most benefit from a DMS. Let your DMS provider know about your findings – it's critical to develop an open dialogue based on mutual trust.

A good provider will want to be thoroughly prepared. A presentation about any proposed solution needs to reflect your company's current archiving, your processes/workflows, how a solution would be integrated within your existing IT landscape, a roadmap of how to implement and accomplish the targeted benefits, and finally how the software will "feel" for users, management and IT administrators. This also includes a Live Demo of one of your application scenarios. Support the effort that the provider has invested in the presentation – which is generally free of charge – by inviting all relevant personnel to participate: future users, IT staff and anyone who might be responsible for the budget. After the presentation, this group of people should discuss if it's worth it to take the next step with this particular provider.

Step 3:
Solution Workshop

It's not uncommon that a final proposal isn't available at this juncture, because the process reveals that the requirements are larger in scope, more processes need to be included, and additional programs need to be integrated into the final solution. It's a good idea to set up a solution workshop with your favorite provider at this point. This will help you further refine the requirements, to discuss and document a detailed solution. This might be when you determine if older documents should be scanned in or imported by an external service, to provide the most immediate and comprehensive document access.

Serious providers will charge for Solution Workshops, as they take 2-4 days, but it's well worth the investment: now you will be completely clear on what your future solution will look like and how the implementation will take place. Your provider is also now able to give you a true proposal. And while you may have formed a secure base for your decisions, you are still at a point when you can opt for another provider if necessary.

Step 4:
Proposal and Purchase

With thorough preparation, any proposal received now should have final prices for software, hardware and all services. It should be completely understandable, even for third parties reviewing it, and should describe how your company can reach its desired benefits and goals.

If the content and the price of a proposal are acceptable, you should opt for the provider who leaves the best overall impression: will the team consisting of the dealer and software manufacturer or in some cases the software manufacturer alone be reliable for the long run? And the software itself needs to feel right: does it contain the latest in technological innovation, or is it still awaiting a new generation? Can it be flexibly integrated with your existing applications? Can you adapt the solution, even without external expertise, to meet your needs? Even if now is not the time for you, it's best to ask if a switch to a Cloud solution is easily done in the future – even ask for an alternative proposal for this option.

Step 5: Implementation and Training

A truly successful DMS introduction means that there will be no noticeable disruption of your daily operations and your users can quickly recognize the benefits of the system for their own work. Depending on how much preparation took place (for example, within a Solution Workshop), you may be able to get started immediately with the installation and configuration of the system.

During the training phase, it's important to focus on your "Organizer." Your IT Administrator or Department isn't always available when you need to make a quick change in the configuration. The trend for introducing new applications is to name one person within each department as the Organizer, someone who has an affinity for IT and who can take care of basic configurations for fellow colleagues.

Good software solutions are so user friendly that training an Organizer never takes more than 1-3 days. For a mid-sized company, a DMS should therefore be introduced within a week.

Outlook: Success Management

Often, solutions are set up and the most important features are working and users are managing reasonably well.

But we want to make sure that your investment pays back dividends, that your company fully benefits from electronic document management and that your users really enjoy working with the program. For this reason, we recommend that you conduct a Review Workshop after 6 to 12 months with your provider.

A trained consultant comes into the company and watches as users work with the program, offering tips along the way. Then the questions and suggestions made by users and Organizer are discussed with the group. A good consultant questions whether the desired objectives have been achieved. Then you discuss whether (and how) other document types and processes should be incorporated into the DMS, and whether other departments might want to be connected. A Review Workshop helps you get another significant productivity boost and increase user satisfaction. Therefore, we recommend that be repeated annually.

About DocuWare

DocuWare is one of the world's leading document management software companies. Its products are available in 70 countries and 16 languages, with over 100,000 users in approximately 11,000 installations.

The company, founded in 1988, operates worldwide from Germering near Munich, Germany, and from New Windsor, New York, with subsidiaries in the U.K., Spain and France.

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