



## **7 Questions to Ask When Moving to Electronic Document Management**

November 2007 by Tim Heald

### **What is my information process now?**

Is our current process getting information to the right people at the right time in the right form? Are there unnecessary duplications, time delays or routing issues? Why is the process the way it is? Was it developed politically or functionally?

### **How could I improve my information process?**

How would the process work if I could start from scratch? Would the same positions be involved? Why do these positions need this information? What is holding me back from making these changes? What is the worst case scenario in my current system?

### **What could my information process look like in 5, 10, 20 years?**

Could I still be using paper? What regulations may change the way I handle corporate knowledge? Will technology allow for more efficient processing? Is my current effort helping or hindering possible changes in the future?

### **What are my primary reasons for considering electronic?**

To save money? To save time? Better customer service? Reduce missing files? Increase security? Disaster recovery planning? Archiving? Out of space? Compliance readiness? Risk management?

### **How do my reasons for electronic records affect my end result?**

Do end users need access to the records in places where there aren't currently computers? Where will the electronic records reside (hosted versus in-house)? What do I need from a software package in storing, managing and retrieving these records? How will backups be handled? Am I converting everything, day-forward or a selected mix?

### **How will I accomplish the three major categories in any electronic document conversion?**

#### **Hardware** – Brand selection, Vendor selection, Requirements

Hardware is perhaps the easiest of these three decisions. Meeting the minimum requirements of most software packages is relatively inexpensive even including electronic storage.

#### **Software** – Vendor comparisons, Software functionality, Service offerings

Finding the right software package for your organization can be difficult. Vendors include a varying degree of features in their base package with the expenses of add-ons sometimes doubling the cost of the application itself. The best course of action is to educate yourself on the commonly available features, determine which are a requirement for your implementation and then put a list out to your vendors for customized quotes. It may be an overused adage, but comparing apples to apples is really the only way.

#### **Physical conversion** – In-house vs. Outsource, Vendor selection, Conversion parameters

The physical conversion of records can be the largest investment in many cases. This is mostly due to the high level of labor involved in preparing, scanning and indexing your vital records with bullet-proof accuracy. Internal conversion efforts can be just as effective as outsourced options but have a learning curve and require a large amount of both managerial and administrative energy.

### **How will I measure success of the conversion?**

Time frame, cost, quality? Will I evaluate cost savings or productivity gains once the project is completed?