Key Questions to Ask when Selecting an Intelligent Document Management Solution

Executive Summary: If you are mid-size enterprise customer with emerging needs to manage content and documents, increase collaboration and preserve documents, then the following items and questions should be considered here:

<u>**Needs Assessment:**</u>

1. What are your needs in the short term and can the current solution adapt to your fluid growth plans (by department and cross functional inter-dependencies teams)? What major items are you trying to solve day one (ex; increasing collaboration while maintaining control and creating a secured environment for internal use as well as suppliers and partners or clients)? Can the solution be implemented in phases across departments (at your pace so an ROI can start sooner)? Should you start with the business context and the problems to solve and then explore the technology solutions to get you there (how valuable are your key digital assets to maximize and grow your business in a secure environment)?

2. How do you operate today in terms of systems, process and people when addressing this pain point and can folks make the transition? Do you have paper documents that also need to be scanned and incorporate into the overall solution?

3. Can you measure the impact of this type of solution in dollar terms or enhance productivity or both and tie back to your operating budget (and if so, how does that happen in a consistent and repeatable manner)?

<u>**Costs Considerations;**</u>

1. How costs are applied today to people, process and systems and what is the trade-offs in the short and long term to allow you to leverage digital assets for collaboration? What level of back-office integration is required with current systems or to supplement the current operating environment?

2. When does it make sense to move from a license environment to a Cloud offering? What type of cloud environment is right for your application (public, private or hybrid) and can security be addressed at the right levels? Could I reduce some of my license costs and supplement my existing system?

3. How fast can I implement a system in order to increase my ROI (take costs out of the business while improving productivity) and what levels of support are required for the implementation and post support?

Financial Benefit:

1. Key to the solution is the measuring the benefit which could mean reduction in IT support, License software and increase in productivity and how much time per department a month are you saving? Is billing via a monthly subscription fee appealing and does that help the budgeting process?

2. Can you determine the payback cycle for implementing such a solution?

3. What additional benefits may be available such as avoiding fines based on regulatory requirements and governance support (if audits and compliance is critical to the business, does this solution and reporting help)?

If you would like a consultative assessment on how we can help with file sharing and collaboration in a secure environment with rich functions, please contact us @ Info Preserve.