5 Strategies to Get Buy-in for Document Management Software

The Challenges of Document Management

It's no secret that today's businesses generate a massive amount of information in a variety of formats. Even small and medium sized businesses or corporate departments deal with an unprecedented quantity of documents that must be stored, retrieved and shared across teams or across the enterprise. While many organizations are no longer dealing with paper-based systems, the challenges of document management are similar, and even more complex when dealing with electronic resources.

The flow of information and content from the originator through intermediaries and ultimately to the recipient can be long and tortuous. In the absence of defined workflows or some form of management system, documents get bogged down in email inboxes and clog corporate servers. Individuals trying to locate the most current version of a document often resort to querying colleagues, searching aimlessly through network file folders and spending precious time trying to find what they need.

Individual and team productivity are not the only things that suffer when documents can't be located, versioned and guided through a defined business process. Government regulations in many industries and privacy laws in many countries set strict mandates on the treatment of records. Companies risk fines and penalties if they are not in compliance with a wide range of laws and regulations surrounding document storage and retrieval.

Anyone who has ever worked in an office knows the frustration of sharing documents with colleagues. Without a centralized repository, documents are usually stored on individual computers and emailed around on request. Worse, when an individual leaves the company, his or her store of knowledge and documents often leaves too. Documents are also subject to loss from hard drive failure if regular backups are not performed.

Document management software is one sure way to bring order to the chaos caused by the proliferation of online resources. But today's economic climate is making it more difficult than ever to justify new software acquisitions. How can you make the case for document management software at a time when shrinking budgets and reduced resources intensify the pressure to do even more with less?

This paper will explore some of the tangible and intangible benefits of document management software, while also giving you some concrete strategies for gaining buy-in for the purchase of a document management product for your organization.

Document Management Software Provides the Answer

capture manage store share track preserve

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The management of information and the technology that facilitates it is a burgeoning field known as enterprise content management (ECM). According to the Association for Information and Image Management (AIIM) International, ECM is defined as "the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes." Document management software falls under this definition as one of the tools used to control the flow of documents in the enterprise.

Document management software provides a variety of benefits to organizations of all sizes and across the spectrum of industries. Many of these benefits can be quantified, while others are more intangible. Gaining buy-in for a document management product implementation will require understanding and measuring both the tangible and intangible benefits that accrue.

Tangible	Intangible
Improved productivity through rapid access to correct content and reduction in paper file handling	Reuse of existing content saves time, promotes consistent branding and eliminates errors
Reduced cost through adherence to optimized document workflow processes	Higher document quality and integrity result from improved review and sign-off processes, versioning and check-in/check-out
Reduced risk of non-compliance to government regulations due to established document retention and management guidelines	Improved employee satisfaction and morale through access to the right content at the right time
Rapid return to productivity following a disaster or data loss due to centralized document storage	Lower email churn and bloat as employees stop using their inboxes as mini-document repositories
Reduction in costs associated with maintaining paper filing and storage systems	Retention of knowledge assets and overall improved access to corporate knowledge
Elimination of the cost of re-creating lost documents	Improved customer service through faster access to accurate information
Secure, controlled, remote access to documents via the Internet no matter where an employee is located	Higher levels of security through password protection and document encryption

Although document management software provides these benefits and many more, the real benefit is in making business processes better. Successful initiatives require project teams to look beyond the requirements of individual end users to better understand the business context associated with different types of documents. Approaching document management from a business context will ultimately yield the results that business managers and end users really want - improved access to information in relationship to their work activities and improved productivity.

5 Strategies to Get Buy-in for Document Management Software

Now that you understand the benefits of document management software and what it can do for your organization, you will now need to persuade key decision makers to purchase the software. These strategies will help you approach those decision makers in the right way and with the relevant information required to guide their decision in your favor.

5 Strategies to Get Buy-in for Document Management Software

1. Gain an early and committed executive sponsor who will champion the project

2. Build a tight business case

3. Find quick wins to get the initiative off to a good start

4. Show similar examples of success

5. Learn about best practices

1. Gain an early and committed executive sponsor who will champion the project

Strong executive support is crucial for any project with the potential to transform business processes and corporate culture. In initial stages, an executive sponsor will understand and articulate the broad objectives of the initiative to other senior managers. He or she may lead a cross-functional committee that gathers requirements from departments, formulates a request for proposals and conducts vendor evaluations. The executive champion should encourage communication and listening among teams who may have different ideas about what is needed and how document management software can fulfill those needs.

A high-level executive presence is also required to facilitate the culture changes needed to transition to a knowledge-sharing environment. If there are unspoken incentives in place to hoard or limit access to documents, then they must be acknowledged and addressed. An executive champion will have the authority to put a new incentive structure in place that rewards knowledge sharing and builds a culture that supports the widespread use of document management software.

This is true whether the document management application is for a department or an entire enterprise. Without a strong and committed champion, the project will falter or may never get off the ground.

2. Build a tight business case

Tie the tangible benefits of document management with measurable results to justify the cost; and determine the indirect measures that can be used to track progress against achievement of non-quantifiable benefits. Before undertaking a project, it is important to identify which benefits you expect to achieve. If all your expected benefits are intangible, you may have a tougher sell than if you have a combination. Think about current ways that your organization measures cost, productivity and risk and how you might be able to use quantifiable data to demonstrate results. You may be able to show intangible benefits through more subjective assessments, such as the outcome of an employee survey that rates satisfaction with current processes, versus those processes implemented via the document management software.

Take the time to do some benchmarking at the outset and it will also pay off when you're called on to justify the system later on. Benchmarks are a valuable tool for convincing doubters that a system is warranted. If you can visibly demonstrate that the time taken by a current process can be reduced using document management technology, you'll have an easier time swaying the doubters and nay-sayers. Don't get discouraged -- building an effective business case is challenging for a variety of reasons: processes are complex; benefits are difficult to quantify; and external benchmarks are hard to find. But a strong business case is necessary for management sign-off in even the best of times, and even more necessary now that budgets have shrunk.

3. Find quick wins to get the initiative off to a good start

If you want to be sure of showing demonstrable ROI for a document management technology investment, you may want to start with a small pilot project that has clear objectives and can demonstrate quick wins. Start by identifying one or two pain points. For example, an easy win would involve identifying and eliminating an obvious source of duplication of effort. Others could be streamlining a lengthy review and approval process to a couple of quick steps, or reducing the time to

productivity of new employees through improved access to policies, procedures and information.

This kind of internal, anecdotal evidence is powerful stuff when it comes to demonstrating the value of a larger-scale rollout of document management software.

4. Show similar examples of success

Rarely is anything more convincing than the successes and testimonials of third-parties in similar situations. Spend some time researching published case studies on the installation of document management technology in other organizations. Speak with people in similar industries who have implemented document management solutions. Learning how other companies with comparable business challenges have benefited may help you further convey the value of the initiative to your decision makers. Case studies can be obtained on many vendor web sites as well as from objective sources including industry publications, analysts and professional associations. Visiting with other companies that have implemented the solution you're considering can also provide you with real-world reference cases you can share with executive leadership.

5. Learn about best practices

Many organizations have had bad experiences with system implementations that have dragged on too long, cost too much and then didn't deliver results. In today's economic environment, technology buyers are understandably wary of making an investment that could cost them their jobs if it goes sour. A careful study of best practices helps avoid known pitfalls. Take the time to learn from the mistakes of others rather than repeating them.

You can often find best practices during your review of case studies, or from professional societies for document and information managers. Conferences and seminars will give you access to people willing to share their expertise and their mistakes. Keep in mind that studying best practices requires analytical skill along with the ability to accurately document the processes or activities in question, recommend refinements, and incorporate them. For best practices to become a way of life in the organization, a team effort is required since entrenched practices and culture may need to change.

Following these strategies will help ensure the success of your document management software initiative, but you also need a product that supports your objectives without straining your budget. That's where KnowledgeTree comes in.

KnowledgeTree Makes Document Management Easier

As you make your case to decision-makers, keep in mind that KnowledgeTree offers some significant advantages over other document management software in the market today. Collectively, these advantages make it easier for your organization to adopt document management concepts and practices quickly.

KnowledgeTree is easy to use:

A simple and intuitive web interface decreases the learning curve and enables faster time to value.

KnowledgeTree works with multiple platforms:

Designed to integrate with your existing infrastructure, KnowledgeTree provides powerful document management capabilities without disrupting the way you work.

KnowledgeTree is affordable:

With a low total cost of ownership, KnowledgeTree puts comprehensive document management software within your reach.

KnowledgeTree is open source

With access to the source code, you're not locked into a single proprietary vendor and you also get the benefit of innovations from an active developer community.

KnowledgeTree is a sensible choice during these tough economic times. Its affordable price makes it an excellent choice for pilot projects and document management proof-of-concepts as you build a business case. And its flexibility and ease of use make it ideal for organizations of all sizes -- even those with limited IT resources.

The need for effective document management doesn't diminish because the economy is troubled. In fact, those organizations who increase productivity without adding head count are the ones most likely to survive the economic downturn. Investing in affordable, easy to use document management software like KnowledgeTree could give you an edge where it counts.

For more information, or to schedule a demonstration of KnowledgeTree, please visit www.knowledgetree.com.

✓ **KnowledgeTree is easy to use**

✓ **KnowledgeTree works with multiple platforms**

✓ **KnowledgeTree is affordable**

✓ **KnowledgeTree is open source**

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