

7 Simple Document Management Tips For Mid-Sized Businesses



Some mid-sized businesses follow a disciplined document management approach, but that's hardly the norm. Most are working with inefficient document management processes that make it difficult to solve problems and respond to questions from suppliers, customers and colleagues.

Improving Inefficiencies In Your Workday

Take a moment and think about your typical workday: You probably process information in a variety of formats, including paper documents, electronic files and countless emails. At most mid-sized businesses – even those with some sort of document management system – that information winds up in isolated silos, such as a paper filing system, a shared network drive and individual email accounts.

As soon as you need to answer a question or solve a problem, you have to search through all of these silos individually to find the information needed. Nine times out of 10, these information silos overlap in some areas, with duplicate data and different versions stored in different places. That inefficiency carries a high cost. It's easy to see how the time wasted searching for information quickly adds up.

How To Start

To reclaim this lost time and dramatically improve efficiency, you need a vision for where you want to go and how you're going to get there. The best way to start is by developing a strategy for tackling your document management problems. Ideally, you would begin by identifying your pain points and the areas of your business that have the greatest need, and then put together a plan of attack. But you don't need a

Step by Step for Success

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perfect master plan to get started today and make a real difference.

Here are seven simple tips for improving your company's existing document management processes:

1 Focus on improving a single department, or even a single process

Choose one area to improve, and keep working on it until you've mastered it. Eliminate silos, simplify steps and automate your process. Then, apply the same approach to the next process.

2 Create a single source of truth

You don't need to eliminate all of your data silos all at once. Focus on eliminating silos for a single department or process, so that there's a single source of information.

3 Make sure your solution is capable of handling all the documents and electronic files your process requires

Your document management system should make it simple to input any document type. When you receive

emails, for instance, it should be easy to quickly drag and drop them into your system.

4 Create a distributed capture environment

Make sure people are able to scan documents into the system from wherever they are; this is especially important if you have more than one office. Multiple scanners and mobile apps lower the barriers to immediately digitize paper documents.

5 Create a workflow, and don't be afraid to improve upon it

The first time you set up a digital workflow, it probably won't be perfect. But once you start the ball rolling, other people are going to see the value of workflows for their own processes.

6 Be receptive toward ideas for improving workflow

Management might think that everybody follows the same process, but people often have their own way of working – and they may be better. As you master each process, your users are going to discover new ways to improve your workflows, so keep an open mind.

7 Be aggressive

Once you master one process or improve one department, resist the temptation to stop there. Build on your success by moving on to the next process.

Some mid-sized businesses get overwhelmed when trying to plan out every aspect of their document management approach, leading to “analysis paralysis.” Meanwhile, inefficient processes continue to drain their resources. These seven simple tips allow you to take action today and start benefiting from digital document management.

Ready to learn more about improving efficiency with digital document management?

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