

## Recognizing When ECM Is Right for You

According to AIIM, on average, businesses spend \$20 to file a single document. It then costs an additional \$220 to search for and replace each document that is not filed properly. The price of these simple administrative tasks is just the tip of the iceberg when it comes to office inefficiencies. From slow processing, to difficulty retrieving files, incomplete data and duplicate work, it is common paper-based problems like these that can severely impact company operations.

A very common theme to improving document inefficiencies is incorporating an [Enterprise Content Management \(ECM\) Solution](#). This cost effective software is designed to improve document-driven processes by taking businesses digital and providing increased insight into daily productivity. But the question remains, is ECM right for your organization? Let's explore some typical business operations and find out.

### Day-To-Day Operations

#### Challenges:

- Disorganization
- High print, storage and labor costs
- Untimely manual data entry and mistakes
- Storage issues in both physical (file cabinets) and virtual space (file servers)

#### Solution:

Designed to automate manual tasks, ECM solutions enable users to free up more time by creating a simple, two-step, scan and shred paper process. With the push of a button, documents scanned from your office [Multifunction Printer \(MFP\)](#) or scanner will be automatically sent directly into your ECM software, keeping critical business data organized and stored in one place. In addition, with [cloud hosted document management](#) you can ensure documents are always backed up and available. Whether you're looking for a resume, receipt, work order, invoice, etc., any type of documentation can easily be accessed, right from your desk. This in return, eliminates all paper-based administrative expenses and the need for onsite storage. With add-on modules like [Windows File System Integration](#), documents can be accessed, edited, and saved right from their native applications, making reformatting an issue of the past and shredding a part of your future.

### Workflow and Collaboration

#### Challenges:

- Difficult to quickly access the right document when needed
- Various document version types that lack visibility into which is the most up to date
- Content spread across multiple business applications
- Lacking mobile access outside the office

**Solution:**

Inefficient document collaboration can be a slow and costly challenge, but ECM is sure to speed it up. Instead of placing a request to retrieve a file, [automated workflows](#) can use intelligent OCR technology to recognize a document type and automatically route it to the appropriate personnel, so you don't have to. Automatic email notifications can be sent, informing employees of pending approval and review on a document. With added features like document versioning and check in/check out capabilities, there's no more guessing who accessed a document last, and if it's the most up to date version. Browser-based functionality allows you to access all data and information via laptop, tablet, and mobile device, and with keyword searches (name, address, phone number), you can automatically pull up all related information anywhere at anytime. That way you can provide quick customer service and no question will go unanswered. Even if you're using business applications like QuickBooks®, Salesforce®, or [Microsoft Office 365™](#), ECM integration allows you to automatically distribute, share, and access data and documents simultaneous between your document management platform and any of the programs above!

**Document Security****Challenges:**

- Keeping data secure (internally and externally)
- Business continuity
- Protection against fire or natural disaster
- Outdated technology that may lead to suspicious activity

**Solution:**

You know what they say - expect the unexpected. But with document management software you can be sure that in cases of natural disaster or theft, this virtual storage solution will keep your documents and their data safe and secure. Audit trail logs allow managers to track who has modified, deleted or accessed records, providing insight into employee activity. User-based permissions can also be assigned, setting guidelines for which employees can view certain files, while also keeping your organization [compliant with government regulations](#) like HIPAA, SEC and FINRA. Additionally, if unwanted activity was recognized within an archive, file, or document, set workflow rules can alert the appropriate manager of the suspicious activity.

Whether you're trying to route and approve invoices, streamline new hire processes, or ensure documents meet their deadlines, we can all agree that daily paper trails can result in heavy operational costs. So, think before you print and consider the benefits of an ECM solution. With its flexible searching tools, accessible web-based platform, and top of the line security, Enterprise Content Management can be customized to fit the needs of any organization. [Contact Square 9 Softworks](#) to start building your document management strategy today!



Digital Marketing Specialist, **Alyssa Anderson**, is the voice behind Square 9 Softworks's weekly blog articles. Committed to communicating today's common challenges in paper based processes, Alyssa provides in depth analysis into the document management industry and the solutions that accommodate the needs of end user communities. For additional information, please contact Alyssa at [aanderson@square-9.com](mailto:aanderson@square-9.com).