

# Your Roadmap For Purchasing

EXIT 6

## DOCUMENT MANAGEMENT SOFTWARE

Searching for any business software might seem like an impossible task; with twists and turns, and even dead ends at times. And scouring the flooded document management marketplace for the right solution can often be equally as frustrating.

The good news is there's a roadmap that will ensure you'll be able purchase with confidence and secure the system your company needs.

### IDENTIFYING THE NEED

Every business is unique and so are their needs. Identifying the stakeholders and underlying company goals on the highest level are crucial to success with purchasing and implementing any software.

#### 1 What are we trying to accomplish here?

*Cutting Costs?  
Saving The Environment?  
Increasing Productivity?*

#### 2 And in what departments?

*AP? HR? Sales?  
Company-wide?*

1

2



#### Research Features

There are a lot of options - Discover what features are out there so you can know which ones benefit your goals.

#### Read-Up

Read about how other companies like yours have used document management software (DMS) to accomplish their goals.

#### Identify the Budget

Look for processes in your company that could be automated with DMS. This is where cost benefits are found can help identify your budget.

#### Education

#### Understand the Cost

Look for non-modular, all-encompassing solutions that offer full functionality for one easy-to-understand price.

#### Annual Fees

Most software require an annual fee - just be sure the low initial cost doesn't come back to bite you at renewal time.

#### Additional Costs

Licensing, Implementation, Training, support and annual fees all add up. Understand what each one means to your bottom line.

### WHAT DO YOU NEED?

Now that you understand all the features document management systems have to offer, it's time to look at what your company actually needs out of the system.

ANSWERING THESE QUESTIONS WILL HELP:

- 1 Who will be using the system now and in the future?
- 2 What are the 'must-haves' versus the 'wants' of the company and stakeholders?
- 3 What is the initial budget based on benefits learned in step 2?
- 4 What are the expected benefits of implementing DMS?

USING THIS INFORMATION YOU CAN NOW CREATE A LIST OF CRITERIA THAT YOU'LL USE IN THE NEXT STEP TO EVALUATE OR JUDGE EACH VENDOR BASED ON COMPANY AND STAKEHOLDER NEEDS.

### CREATING THE SHORT LIST

At this point you probably have a long list of vendors to choose from, but narrowing that down can seem daunting.

Narrow down your list by evaluating at a high-level:

- 1 SOLUTION MATURITY
- 2 COMPLIANCY STANDARDS
- 3 CRITICAL SUCCESS CRITERIA
- 4 IMPLEMENTATION AND POST-IMPLEMENTATION SUPPORT

### SCHEDULE DEMOS

It's time to start reaching out to your short list and schedule product demonstrations for a better look at their features and functionality.

Allow for plenty of time. Product demos can take an average of 30 - 90 minutes - be sure to ask how long and try to include stakeholders if possible for better success!

AVERAGE  
30-90  
MINUTES

### CHOOSE A VENDOR

Narrow in the short list to 2-3 vendors and schedule any proof of concepts to show your stakeholders and management teams.

Weigh the feedback your stakeholders have to offer along with the quotes and proposals from each vendor to ensure success!

PURCHASING SOFTWARE IS THE FIRST STEP TO A SUCCESSFUL INVESTMENT. EACH VENDOR WILL HAVE A DIFFERENT PROCESS FOR IMPLEMENTING YOUR NEW SOFTWARE. STARTING OFF ON THE RIGHT FOOT WILL HELP YOU ENSURE THAT SUCCESS! HAPPY TRAVELS!

- 1 EXPECTED TIMELINE TO IMPLEMENTATION
- 2 ON-BOARDING DOCUMENTATION

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