

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.





to accomplish here? Cutting Costs?

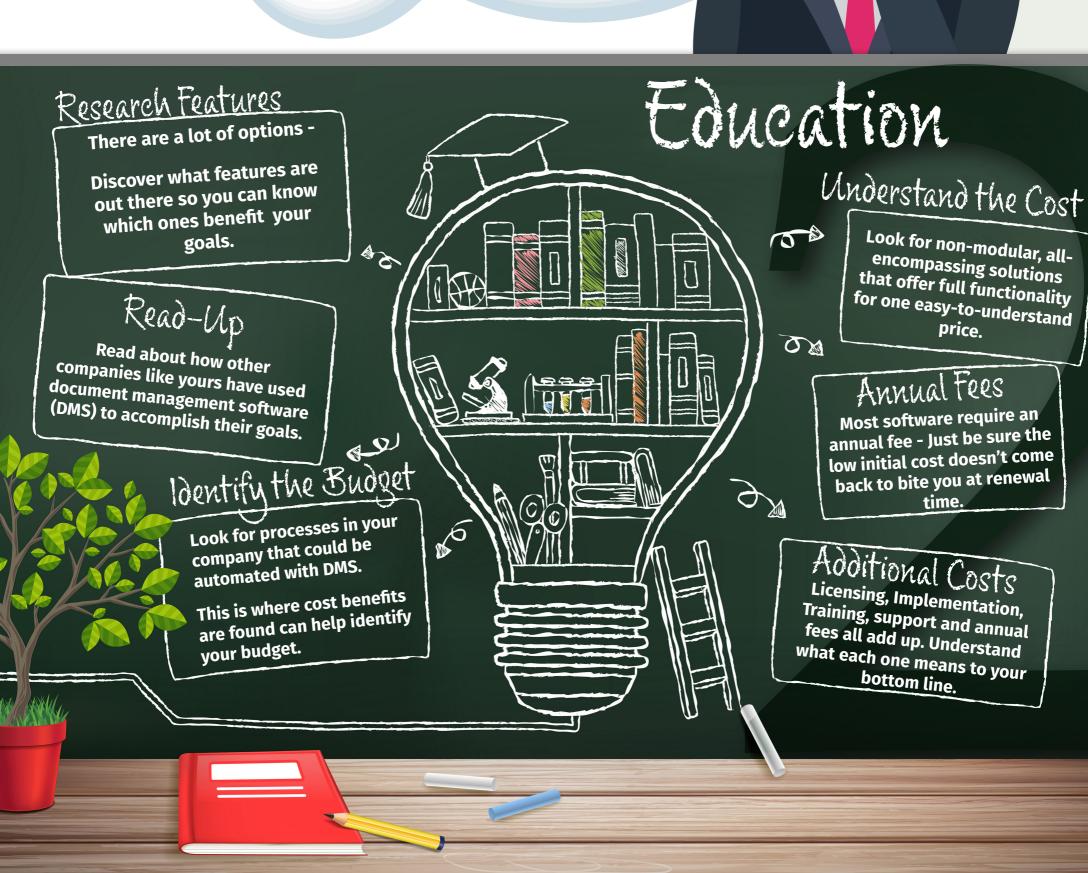
What are we trying

Saving The Environment? Increasing Productivity? And in what

> departments? AP? HR? Sales?

Company-wide?







Now that you understand all the features document management systems have to

WHAT DO YOU NEED?

offer, it's time to look at what your company actually needs out of the system. ANSWERING THESE QUESTIONS WILL HELP:

Who will be using the system now and in the future?

- What are the 'must-haves' versus the 'wants' of the company and stakeholders?
- What is the initial budget based on benefits learned in step 2?
- 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.

What are the expected benefits

CREATING THE SHORT LIST

long list of vendors to choose from, but narrowing that down can seem daunting.

At this point you probably have a

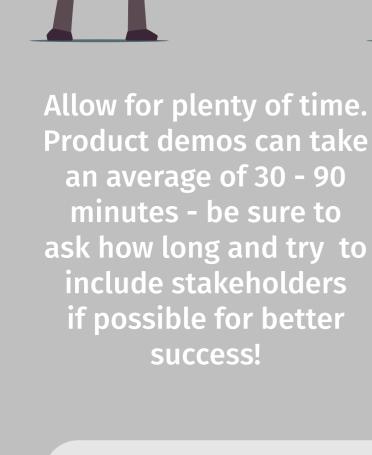
SOLUTION MATURITY 2 COMPLIANCY STANDARDS

Narrow down your list by evaluating at

a high-level:

- IMPLEMENTATION AND POST-IMPLEMENTATION **SUPPORT**
- SCHEDULE DEMOS





AVERAGE 30-90 **MINUTES**



CHOOSE VENDOR



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

VENDOR WILL HAVE A DIFFERENT PROCESS FOR IMPLEMENTING YOUR NEW SOFTWARE. STARTING OFF ON THE RIGHT FOOT WILL HELP YOU ENSURE THAT SUCCESS!

EXPECTED TIMELINE

TO IMPLEMENTATION

ON-BOARDING

