How important is Document Management to Your Organization?

With all of the tools available in the Industry to help "make things easier", chances are that your organization is already benefiting from some sort of Document Management System. But what does that mean exactly? Today, when people use this term, they are usually referring to an electronic form of Document Management. But when you get down to it, whatever process you already use to share, manipulate, store, and retrieve documents and information *is your* Document Management System.

The problem is that most organizations (and individuals, for that matter) don't put any more time into how they want their DMS to function than they do which gas station to fill up at. A large part of this can be attributed to the fact

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that a DMS is often times crudely "built-in" to operations. An example of this is when information is expected to be stored by an individual that he/she is *obviously* responsible for, right? And that individual produces this information wherever and whenever it is needed. Of course, if after reading this you are chuckling to yourself, it's because you know that this sad system has about as much dependability as a house of cards.

The good news is that you can significantly improve the way you manage your information with your newfound awareness! And with technology pushing our limitations further and further away, it has really become more about total *Information* Management, as opposed to just documents. Take a client file, for instance. Let's say you have a business card, email, and voicemail from this client. 10 years ago if you wanted all of this information together in a file under "Client ABC" you would need to print the email and translate the voice message to paper to put it in the file. Without doing this, you don't have a full tracking of all of the *information*; you'd only have a tracking of physical *documents*. So while you
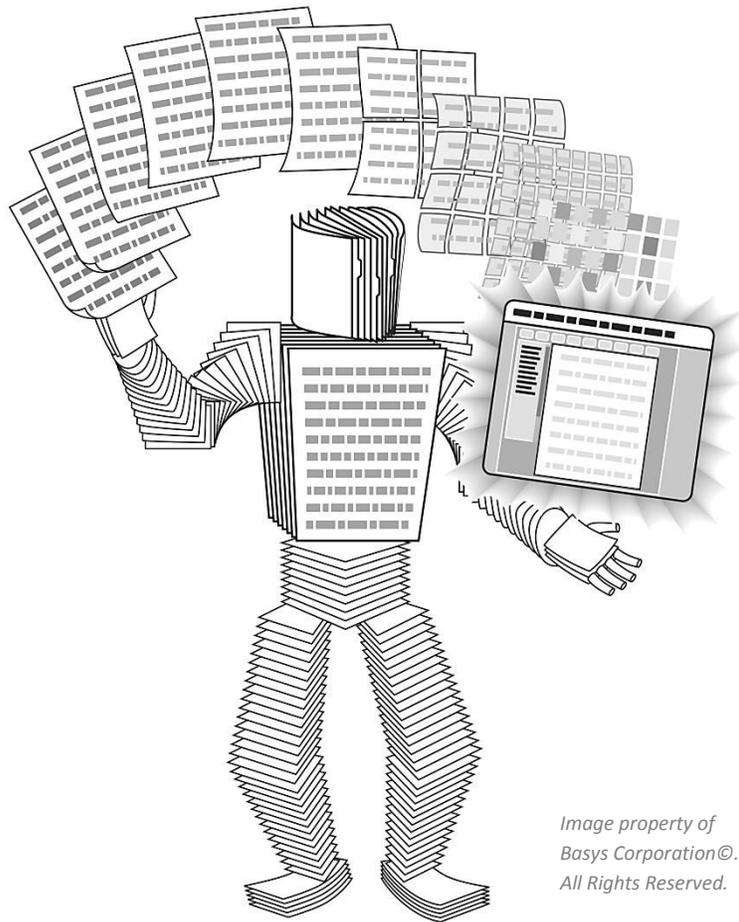
may remember parts of what he said in his voicemail three weeks down the road, you may not remember important details… Like if the meeting today was scheduled for 9 AM Eastern or Central time? So while it would be extremely helpful to have an accurate record of all of this info, you don't have time to maintain a system like that! Luckily, today you can easily forward the email, .wav file of the voice mail, and a picture of his business card you snapped with your smartphone to "Client ABC's" digital file in the cloud. Thus, tracking and managing all information associated with Client ABC without any extra work.

Out of necessity, it may be possible that you have already begun using a very basic system similar to this. The obvious first choice for this vehicle would be your email program. But even the most organized inbox is incapable of fulfilling key needs of a proper Information Management System. So what's the next step? First you need to evaluate how you are currently storing, retrieving, and manipulating your data. What form is the data in? Are they hard-copy documents, or are they electronic? Is it all in the same format or is it spread across multiple locations and systems? Does everybody else in the organization know where to find it? Do you have a recovery plan in the event of a natural disaster? Once you've answered these questions, chances are that you will already have a pretty good idea of how you can improve your IMS.

Next, you need to understand your needs. Do you have any team members that work in separate physical locations? If so, how should they get to the information that they need to carry out their work? Even if everybody is in one office, do certain people have access to information that others don't, but should? If you are out of the office, do you have to set reminders to finish a task when you "get back to the office" because you didn't have what you needed to complete the task? What method makes the most sense for adding new information to the system?

After you've looked at your current process and defined your needs, evaluate where you're coming up short. It should be easy to see what areas are causing frustration wasting your resources.

Finally, design a better way. A quality system should integrate with your operational flow. For example, if you have multiple locations and one finance department, Vendor Invoice Approval is something you should consider amalgamating with your IMS. There are many programs out there that will easily communicate with the things you already use, like accounting and property management systems. Moving to the cloud will allow you greater access to your information, such as on smartphones and while away from the office. Regardless of what you choose, your IMS has to make sense for *you.*

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