

# 3 KEYS

## TO CHOOSING AN ECM SOLUTION

ECM increases efficiencies throughout organizations by eliminating manual, paper-based processes.

The solution captures documents electronically and stores them in a single, central repository for immediate access to them and related content. Additionally, enterprise content management (ECM) provides users with automated workflows for business processes, increasing speed, accuracy and visibility.

Use this piece as a guide to assist you in choosing and developing an ECM solution.

[Read on »](#)

## 1 Determine your business needs

One of the first steps in selecting an ECM solution is identifying your organization's needs and researching what ECM solutions might be a fit. To get started:

### **Identify your biggest inefficiencies:**

Bottlenecks that slow down processes can be streamlined electronically through automation—reducing paper use and increasing transparency.

### **Consider your human-driven processes:**

Identifying how your employees work – and the data, documents and processes they use every day – gives you a more comprehensive view of business requirements. It also helps ensure end user adoption and better outcomes in human-driven processes, including improved decisions, customer service and issue resolution.

### **Research ECM best practices:**

Analyst research firms like Gartner and Forrester provide valuable insight into making the right IT investments for your organization. Speak directly with consultants or gather information through webinars and blogs or reports like *Gartner's Magic Quadrant for ECM* and the *Forrester Wave: ECM Suites*.

**Talk with peers:** By soliciting recommendations from similar organizations and talking to peers using ECM, you'll continue to develop your perspective on how a system will function in a real-world scenario. Ask vendors for references and look at the client lists on their websites and call a few similar to yours.

## 2 Examine your options

Once you've identified your business needs and reviewed best practices, it's time to research vendors' products. When doing so, make sure you:

**Be specific:** Be specific on your requests for proposal/information and scrutinize the answers. Ask for a demonstration on how a vendor's solution will work in your organization and improve your daily processes, while supporting the way your employees work.

**Ask questions:** You need to know that you're getting value from your investment. When evaluating an ECM product, ask the following questions:

- Will my investment yield a return today as well as in the future?
- Does the product offer flexible deployment options, both on-premises and in the cloud?
- How much custom coding is required? What are the costs associated with it?
- Can the ECM solution scale to accommodate multiple offices and locations?
- Will the ECM solution integrate with existing line-of-business applications?

These questions are not all-encompassing, but the answers will offer a clear picture of a product's capabilities and how well it will meet your needs.

**Plan for the future:** The right solution will expand beyond your immediate needs. For example, if you're looking for a system to automate AP processes, it should also have the ability to add value to human resources, accounting and legal. Your ECM system should integrate seamlessly with other line-of-business applications, leveraging existing IT investments across your enterprise.

## 3 Analyze specific vendors

After examining your options, the next key is to research each vendor. Look for a company that:

**Won't sell and run:** It's important your ECM investment improves your business processes. With a true partner—one that provides 24/7 tech support and offers continuous training and certification options—you'll get the most from your technology investment.

**Has knowledge of your business processes:** Making sure the vendor knows your industry is equally as important as having deep ECM expertise. If a vendor doesn't know the challenges you regularly face, you could add time and money to your purchase, implementation, deployment and upgrade process. A vendor with industry expertise speeds discovery and solution development, saving you time and money.

**Will meet your needs now and in the future:** When purchasing an ECM solution, value must be based not only on what it takes to get the solution in the door, but what it takes for the solution to provide long-term value. Your ECM solution should be flexible enough to change with shifting business needs and extend into other departments and offices as time and budget permit.

**Will be there in the long run:** Choosing a long-term vendor means it's financially stable and devotes substantial time, money, research and development to its product. The vendor must provide new functionality annually and consistently collect feedback from its customers. The vendor should also follow a product roadmap detailing how it will continue to help users in the future.

Learn more at [OnBase.com](https://www.onbase.com) »