

# Deploying EDM: Ten Pitfalls to Avoid

By Jim Thumma



Electronic document management (EDM) isn't just an opportunity for workplace improvement and cost savings; it's a tremendous responsibility. Those who succeed redefine their workplaces with savings and services unimaginable with paper and manual processing. Those who fail waste precious time and funding on solutions that are never completely implemented or that produce disappointing results.

If you understand common pitfalls and plan accordingly, there's no reason for failure. The opportunity for success is great with careful preparation.

### Try to avoid:

## 1. Selecting solutions based on bells and whistles

Many people make technology choices based on what they have read or heard versus researching their true needs internally. Assess your requirements carefully; conduct due diligence up front. You'll make better choices and see stronger ROI.

## 2. Focusing too much on IT or too much on business

Aligning IT with business goals is crucial. Often, projects are planned with too much of one and not enough of the other. Business processes are what drives the enterprise; it's where everything must start. Processes shouldn't be created to show technology's value; rather, technology should be leveraged to get more value from your business processes. Make sure your team is balanced, understands why the project exists, and shares a common vision.

## 3. Poor project management

Failure isn't usually due to ignorance. Typically, it's a mismatch between expectations and delivery. Make sure you:

- Find an enthusiastic, capable manager to lead your project from start to finish. Build a solid team. Encourage open discourse from day one.
- Work with your vendor to create a written, agreed-upon statement of work, including timetables, milestones, benchmarks, and recourse if expectations aren't met.

Don't hurry the planning process. Back-file imaging, system migration, and integration shouldn't be rushed. Why invest in a great solution and not dedicate the time needed to ensure its success?

## 4. An insufficient indexing plan

In the digital world, Metadata is King. Indexing plans illustrate how you will identify your documents across the enterprise. They also detail how you will secure, search, and set retention plans for them. Oversimplified indexing creates system limitations. Overcomplicated indexing causes unnecessary slowdowns and wasted efforts. Involve a team representing a broad cross-section of your staff to determine logical categories for classification, document types, searches, and workflows. Data drives everything. If you put garbage in, you'll get garbage out.

## 5. Creating standalone systems

Documents sitting in filing cabinets are worthless until someone retrieves and interacts with them. The same is true of digital files stored in EDM. To take advantage of more than just inherent efficiency gains, EDM must be integrated into your current lines of business, company websites, and portals. EDM integration puts the right information at people's fingertips when they need it, wherever they are. If you ignore integration, you're missing the point.

## 6. Selecting niche / line-of-business solutions

Many EDM solutions are initially deployed to address departmental needs. Purchasing niche solutions without considering enterprise needs results in disjointed solutions, causing data isolation, inefficiency, and frustration. Think big; start small. Ask yourself how EDM can help your entire company while solving immediate needs. It's possible – and wise.

## 7. Replicating manual processes

EDM exists to eradicate paper and cumbersome manual processes. Migrating from paper inefficiency to digital inefficiency makes no sense and wastes valuable resources. After you've committed to EDM, take time to re-evaluate routine processes and make them more efficient. Get input from all levels of staff: end users have helpful insights that lead to meaningful improvements.

## 8. Establishing unrealistic goals

Migrating from paper to EDM and business process automation is exciting, but it can be overwhelming if you tackle too much at once. Ambitious goals won't be met if they're perceived as unattainable. Make improvements stepwise. Recognize achievements, and your staff will gain confidence in their ability to excel with new technology. As they do, they'll raise the bar on expectations and work hard to meet them.

## 9. Too many goals

Short-term planning has long-term consequences. Ask yourself where your company will be in three, five, or ten years. Prioritize your needs and create plans with your long-term vision in mind.

## 10. Failing to address change management

Even project plans with clear goals, detailed objectives, reasonable expectations, and viable timelines can fail if staff isn't given the tools and training to enable success. Expectations must be managed from the beginning of the planning process. Frequent, clear, written expectations ensure everyone understands project goals, objectives, and strategies. Make sure everyone has numerous opportunities to express concerns, provide input, and give feedback. Adjust plans accordingly.

## Plan for success

EDM is a springboard to organizational efficiency when it's well planned, clearly communicated, carefully implemented, continuously evaluated, and improved. Involve your team in the planning process. By encouraging everyone to take ownership in improvement, you will succeed.

*Jim Thumm, is vice president of sales and marketing at Optical Image Technology. For information about Optical Image Technology and DocFinity products, please visit [www.docfinity.com](http://www.docfinity.com) or call 800-678-3241.*

The image shows a screenshot of the TAWPI website. At the top, there is a navigation menu with links for Home, About Us, Contact Us, and a search bar. Below the navigation, the main heading reads "TAWPI is your resource for education, networking and business opportunities in payments automation and document management." To the right, there are several featured sections: "TODAY MAGAZINE", "TAWPI EXCHANGE", and "VENDOR DIRECTORY". Below the main heading, there are sections for "EVENTS" (listing dates from July 8, 2009 to September 17, 2009) and "INDUSTRY NEWS" (listing dates from 9/23/2009 to 6/18/2009). A sidebar on the right contains "Question of the Week" and "ADVERTISE WITH TAWPI".