Take the first step towards efficiency

InDoc EDGE

SELF-ASSESSMENT QUESTIONNAIRE
FOR SELECTING THE RIGHT DOCUMENT MANAGEMENT SOLUTION

CURRENT PROCESSES AND CHALLENGES	How do we currently manage documents? What are the main challenges we face with our existing document management system?
OBJECTIVES FOR IMPROVEMENT	What specific goals do we expect to achieve with the new solution? Which of our current processes would benefit most from increased efficiency or automation?
SECURITY AND COMPLIANCE	What specific security requirements do we have for our documents? Does the solution need to comply with specific regulations or standards that are important to our business?
ACCESSIBILITY AND MOBILITY	How important is remote access to documents for us? Do we need to be able to access the documents from multiple locations or with mobile devices?
COLLABORATION AND DOCUMENT SHARING	How often do our teams work together on documents? Do we need features for real-time collaborative work on documents?
INTEGRATION WITH EXISTING SYSTEMS	What other software or tools need to be integrated with this solution?

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SCALABILITY AND ADAPTABILITY	What are our short-term growth forecasts for the business? Do we expect a higher volume of documents as our business grows?
USER EXPERIENCE	How technically skilled are our users? What do we expect in terms of the user-friendliness and learnability of the system? Should we test the solution before full implementation?
BUDGET AND INVESTMENT	What budget have we set aside for the implementation and ongoing maintenance of a document management system? What is our upper limit for the total cost of ownership (TCO) of the document management solution?
SUPPORT AND MAINTENANCE	What level of support and training do we expect from our solution provider? How important is local support to our operational requirements?

CHOOSE THE RIGHT DOCUMENT MANAGEMENT SOLUTION

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Before you start looking for the ideal document management solution, you should focus on a self-analysis of your current processes and goals or expectations. Determine exactly what you want to improve, what your specific needs and limitations are. This step is essential because only then can you clearly define what you expect from the solution and how it can contribute to greater efficiency in your company.

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