Automate This! How Departments Are Being Transformed.

Digital document management systems are the single most transformative tools for businesses in this day and age.

Aside from eliminating the burden of shuffling papers and endless filing cabinets, **digital document managements systems improve workflow, efficiency, productivity and security,** among other things.

The trends in digital document management are changing and evolving rapidly. Here are some of the most prevalent and relevant for organizations of all sizes and industries:

1. Quickly create customized forms.

Take any document, contract, PDF or form you currently use and create an electronic form supported by a digitized process that improves accountability and productivity. By creating a system of digital forms, you are better able to standardize processes and address regulatory compliance.

Take the example of an elementary school who took their field trip planning digital. When changes to permission slips, approval routing or requests for funding changed, they simply adapted their online forms and saved the hassle of re-printing, copying and filing their updated documents.

Not only did they save significantly on paper consumption, but all parties involved (teachers, parents and administrators) were able to quickly access the changes online and avoid the hassle of extensive meetings and trips back and forth between offices.

Best yet, the money saved on paper allowed them to reallocate the funds to improving their field trips and giving more to their students.

Simple-to-use form builders allow you to customize your digital documents based on your organization's unique needs.

With digital forms, **editing and revising documents just got a whole lot easier and eco-friendly.**

2. Secure your data with access controls.

From hiring and letting go of employees to managing vacation requests and benefits forms, HR professionals need to be highly organized and keep employee information confidential.

Rather than relying on piles of paperwork, HR departments can turn to content and document management systems to streamline personnel tasks, expedite onboarding processes and manage employee data.

Best yet, for every file, they can set specific access rights per person, group or department.

With your standard filing cabinet, sensitive information is left vulnerable to falling into the wrong hands. In a moment, it can be accessed, revised or even stolen without much effort. Should a paper document get stolen or lost, you'd have virtually no way to ever find it again.

With a digital document management system, **personnel files, contracts and financial information are secure and safe. Access is never granted without property authority and rights.**

Individuals and departments can control compliance by setting tracking options to monitor edits, revisions and actions taken on all your documents, so nothing falls through the cracks. Document security is imperative for all departments, but most specifically Human Resources, Legal and Finance.

3. Decrease overhead costs and save space.

Admin professionals have a to-do list a mile long. Organizing files, keeping notes, sharing documents and managing company information is time-consuming and requires a lot of supplies and equipment.

When space is already limited, the last thing they need is another filing cabinet crammed beneath their desk or in a faraway supplies closet!

With digital document management, teams can **reduce costs in paper, printing, supplies and equipment**, not to mention network drive storage and staff to manage it all.

Now, imagine your paper supplier is delayed, or your printer malfunctions. Fortunately, using a digital document management system eliminates many of the woes of the unexpected, which are bound to happen.

For teams spread across multiple locations, you can eliminate the cost of transporting documents or supplies from branch to branch.

For small businesses or organizations that are tight on space, large volumes of paper can take up a lot of space that would be better used in other ways. Similarly, larger organizations,

requiring a lot of paperwork may be overwhelmed by the mountains of clutter and documents. And, you **never have to worry about running out of storage space**!

In addition to being cost and space effective, digital document management systems are aesthetically pleasing to the work environment and create a more productive atmosphere for the whole team.

4. Remove geographical limitations of data access.

Relieve your sales team of geographical limitations with digital access to all their data, anytime and anywhere. Account managers, sales reps and sales managers are busy professionals, tasked with a variety of responsibilities involving updating documents, estimates, contracts and invoices.

Organizations often run into difficulties with more traditional Customer Relationship Management (CRM) systems with limited abilities to add, update and track documents, and communicate in real-time with related departments, particularly when it comes to integrating marketing and sales campaigns.

Digital document management systems and CRM tools allow sales professionals to seamlessly manage and analyze customer interactions and data throughout the sales cycle.

Forget about hunting down a pesky document in a sea of many. With digital document management, all your documentation is available at your fingertips: saving you time and energy.

Access your documents from a variety of platforms (desktop, mobile or tablets), anytime and anywhere. If you have to go off site, take a business trip or work from home, you **never have to worry about losing access to your documents or carrying them along**.

5. Reduce bottlenecks and improve efficiency.

Getting your team on board with consistent, standardized processes can be a challenge -- especially in organizations with a large number of employees.

With digital document management systems, it's easy to establish a uniform, streamlined approach to all your processes, and train your team to use the system. Time isn't lost searching for documents, tracking workflow or contacting colleagues for clarifications -- it's **all consolidated onto a single platform.**

Set tasks and organize workflows based on the content of your documentation. **As tasks move through the workflow, employees can track the progress, leave updates and collaborate with greater ease.**

Digital workflow helps organizations identify roadblocks, bottlenecks and weak spots quicker than manual processes. The best part is, your system is completely customizable, so it can grow and adapt with the evolution of your organization.

6. Unify your data on a single platform.
Let's say your Accounting department works with Quickbooks, Marketing and Sales teams manage client accounts through InfusionSoft and your HR team operates on Oracle. When their paths cross (as they inevitably will), do your programs integrate and complement one another, or do they through another monkey wrench into the system?

There are plenty of softwares to handle each and every facet of your business, yet very few that rise above and work for every organizational division.

With a single unified system, all your information is in one place, thus allowing for greater ease of auditing and monitoring regulatory compliance. All moving parts, including working with vendors, contracts, invoicing and status updates operate in cohesion, so you don't have to waste precious resources and energy working across multiple programs.

7. Gain cost certainty and business continuity by upgrading to The Cloud.
Cloud computing means your content is accessible anytime, anywhere. **Employees don't need to work within a closed network or from a specific computer to access their files** -- all you need is a working internet connection!

Cloud storage works for organizations of all sizes and is scalable, as your size grows. And, don't worry about losing your data -- it's safely stored in the cloud!

We're real people who understand and care about your business and the challenges it faces.

Tell us where you need IT support and **we'll craft a customized plan** to accommodate your needs.

[Schedule a FREE Consultations to get started](#) and watch your business succeed with our recommendations.

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