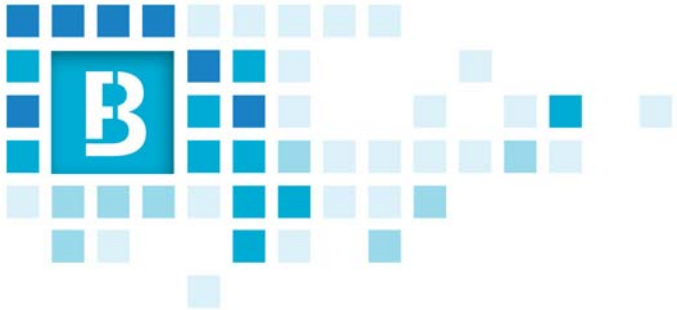


22 Red Flag Phrases

That Means your Business Now Needs a
Paperless Office Document Management System

Part of the Series "Towards the Paperless Office"



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Edition

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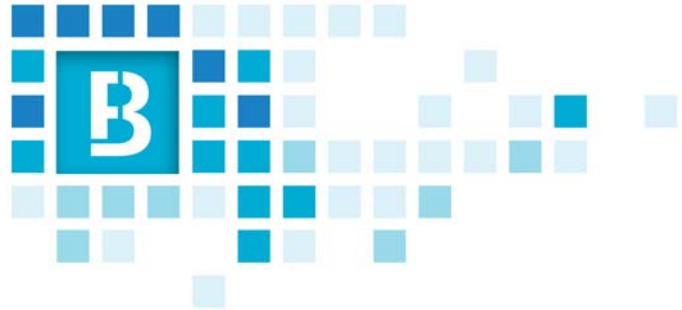
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What is a Document Management System?

A Document Management System (DMS) is software that **stores and tracks electronic documents** and/or images of paper documents. It involves scanning, electronically saving, storing and retrieving documents received or created by an organisation. The term '**document**' includes **all electronic files** such as Word, Excel, PDFs, emails and accounting data files, even multimedia files such as MP3s and WMV files and image files such as JPG and PNG.

A DMS makes it easy for any document to be electronically filed, centrally stored, **appropriately shared, quickly found**, effectively secured, simply tracked, **quality controlled**, efficiently dispatched and conveniently archived.

"Isn't Windows Explorer a DMS?" **Windows Explorer does not qualify as a DMS system.** It is the exact opposite of a DMS because it is:

- **slow** for electronic filing – users must browse to the correct drive and folder, often many clicks deep;
- makes it **difficult to find** a document unless you know which folder it was saved in,
- provides the user with **too much discretion** regarding creating and naming folders (directories);
- requires users to take **time** and have the **discipline** to apply file naming and save location decisions;
- allows the user to **look in only one folder at a time**, making searching laborious;
- provides **no quality control mechanism** for review and approval processes;
- provides **no audit trail** regarding who has worked on a document; and
- does not allow the user the flexibility and convenience of searching based on the status of the document, who is preparing it, who is to review it and so on.

If your staff are using Windows Explorer (which includes opening and saving documents via Microsoft Office Word and Excel), or they are using a 'Documents' tab in your Practice Management System that is simply a view into the Windows Explorer folder structure, each staff member is likely to be wasting 20 to 30 minutes of their time each day looking for documents. This does not include time spent 'reinventing the wheel' when staff recreate documents that they know exist, but they cannot find. (See Something to Think About on p11.)

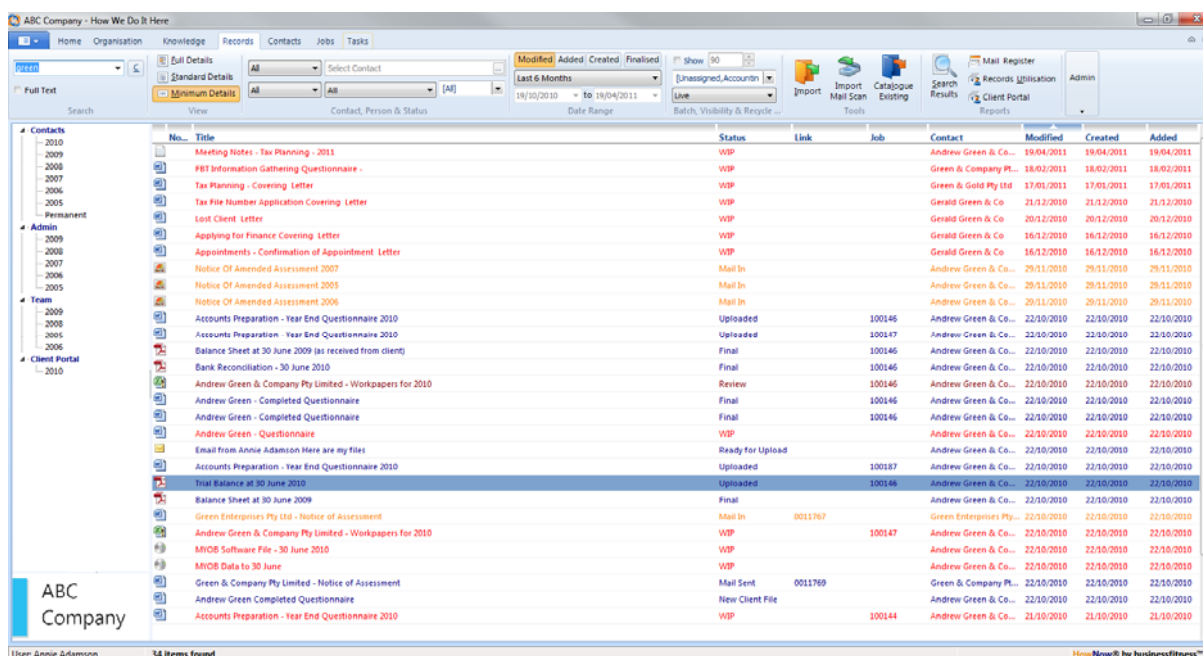




What is the HowNow® Document Management System?

HowNow is all about knowledge and speed. (How = knowledge, Now = speed). It helps you and your staff to find what you're looking for, fast.

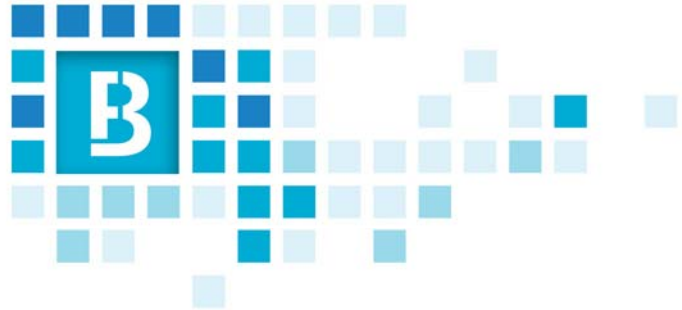
It's a simple to use yet powerful Document Management System that enables your business to operate a paperless office by efficiently managing all of your electronic files such as emails, scanned documents, PDFs, Word documents, Excel files, data files, multimedia files ... any file that you can double-click in Windows Explorer and it opens a program, HowNow can manage, but *much* more efficiently and easily.



Imagine being able to find any document or email—or collection of documents or emails—relating to a client or project, within a second or two. No looking through folder after folder. No 'browsing' and clicking through elaborate structures. Just type a couple of words and HowNow displays what you're looking for with lightning fast speed. (That's not exaggerating, as you'll see if you choose to have a demonstration of HowNow.)

What would it mean to your business if you could save at least 30 minutes per person per day by eliminating the wasted time taken looking for electronic documents, emails, paper files and other documented knowledge? And what would it mean to standardise and systemise your procedures and templates across the business?





A BUSINESS OWNER'S GUIDE

22 Red Flag Phrases that Mean Your Business Now Needs a Paperless Office Document Management System

If you hear any of these phrases in your business, it means you need to start looking into getting a 'paperless office' Document Management System such as **HowNow by Business Fitness**:

1 "I don't know what emails have been sent to this client"

Life without HowNow

Each person's Outlook Inbox is a 'silo' of information. Sent and received emails are not shared across the organisation or easily found by other team members. Team members don't know what has been communicated with a client via other peoples' emails. This presents a risk to the business and is very poor record keeping.

Life with HowNow

These important documents ('records') are centrally stored and shared across the organisation. When team members Send or Delete an email in Outlook they are prompted, 'Add this email to HowNow?' A second or so later and the email (and any attachment) is centrally stored under the client folder structure on your server.

2 "Our emails are stored all over the place in each person's Inbox"

Life without HowNow

It certainly doesn't make any sense to store sent and received emails within each staff member's Outlook Inbox. Behind the scenes, this means these files are stored in each team member's Outlook .PST file or MS Exchange Mailbox. Wouldn't it make more sense to store emails as individual files under each client's area on the server; in the same place you store Word, Excel, PDF and other files that relate to a client?

Life with HowNow

HowNow stores the emails it saves out into your client-centric folder structure on your server. It automatically saves them in Outlook format (.msg files) which means when an email is opened via HowNow it looks exactly the same as it would if opened from Outlook, and any attachments are also left intact with the message. From an IT perspective, this also keeps .PST files and Exchange Mailbox sizes low.

3 "Please consider the environment before printing this email"

Life without HowNow

In a paper-based environment, when a staff member receives an important email they think should be added to the client's paper file, they need to 1) remember to take the initiative to file it in the first place, 2) print it, 3) collect it from the printer, 4) find the paper file 5) then the paper needs to be punched and bound. What a waste of time and money, and paper!

Life with HowNow

Once you start using HowNow Email Manager, you'll smile when you see, 'Please consider the environment before printing this email!' You won't even consider doing that, instead file the email into the client's electronic file within a second. It is quicker to file the email, later retrieval is lightning fast and not restricted to one-person-at-a-time access as it with paper files.





4 **"Who's got the client file at the moment?"**

Life without HowNow

The great paper chase. Keeping track of whose desk (or floor!) a particular file is currently on isn't easy. After the walk around the office comes the email out to the entire office. Calculate what these types of unnecessary interruptions are costing your business. You can eliminate them ...

Life with HowNow

Any person can access a client's file at any time, from any computer on the network whether in the office, working remotely at home or travelling. HowNow will control who is editing a document (so you don't get version control problems) and you can specify who is allowed to see which files.

5 **"This client file seems to be missing some documents"**

Life without HowNow

Perhaps some documents haven't made their way to the paper file yet? Perhaps they're sitting in someone's filing tray somewhere? Still sitting on (or next to) the printer? Or maybe staff haven't been disciplined in printing, collecting, punching and binding documents? There could be many reasons for an incomplete paper file; all of them stem from the fact that paper filing is labour intensive, consuming precious staff time.

Life with HowNow

Using HowNow, filing emails, letters,, Excel files, scanned documents, PDFs and any electronic file is so quick and easy; it means that more documents get filed. There's no need to think, "I'll file that later" because the filing is done within seconds. Your electronic record keeping becomes comprehensive which reduces the business' risk and helps you better manage client relationships by recording 'the whole story', not fragments in an incomplete paper file.

6 **"I can't remember where I saved that file"**

Life without HowNow

Windows Explorer requires you to remember *where* you saved a file in order to easily find it again. You need to remember which drive, which folder, which subfolder, etc. That's often easier said than done, especially when there are a myriad of folders and subfolders on your system.

Life with HowNow

Behind the scenes HowNow saves your files into a folder structure on your server, but you don't need to remember *where* you saved a file in order to find it. Type in part of the client name or client code or a keyword or two, and HowNow will find the relevant documents for you in seconds.

7 **"Where would he/she have saved that file?"**

Life without HowNow

It's hard enough trying to remember where you saved your own files, let alone try to guess where a colleague may have saved a particular file. You can try looking in a number of folders and if you don't find what you're looking for, you might walk down the hall, or send an email to ask your colleague. This wastes everyone's time.

Life with HowNow

In less than the time it would take you to walk to the next office or type a quick email, you will have found the electronic files you're looking for regardless of who or where they saved it. The search in HowNow is very easy and very flexible. You can filter your view based on a number of things such as who created a file, who approved it, when it was created, file type, etc.





8 "I'll dig that up and get back to you"

Life without HowNow

When a client calls and has a question about a piece of correspondence or a document in their file, the usual response is to put them on hold while you try to locate the file. If this takes a little while, you let them know you'll dig it up and get back to them. Email or phone tag then ensues until you reach the client again. A waste of time.

Life with HowNow

The keyword search in HowNow is so fast that you don't even need to put the caller on hold before you find what you're looking for. This provides highly responsive and impressive client service and saves everyone's time by avoiding the telephone or email tag. The document will hit the caller's email inbox while you're still chatting!

9 "Why are there are no file notes in this client's file?"

Life without HowNow

Despite the fact you know there have been client meetings and/or telephone conversations with this client, there is no evidence of this in the file. Where are the notes? Still in the staff member's notebook perhaps? Scratched on the back of an envelope? In their head? Who knows?

Life with HowNow

Creating a file note is as quick as one keystroke to open it up, then just start typing, click OK, then HowNow automatically files the note under the client. Easy. The title and body of the file note are also keyword searchable, should you need to search on its contents in the future.

10 "I'll keep that file on my laptop. It's too sensitive."

Life without HowNow

Business owners and senior management are the worst offenders here. Keeping sensitive documents away from prying eyes by storing them on your laptop is very poor electronic record keeping. How often do you backup your laptop? What if it was left in a cab or stolen? Your laptop is no place for sensitive documents.

Life with HowNow

Using the Visibility feature in HowNow you can decide which team members can see which documents. This protects sensitive documents but achieves the best practice of having a centralised electronic document storage system. You can also use the Encrypt feature to lock down files so they cannot be opened via Windows Explorer.

11 "Why do we have so many folders in Windows® Explorer?"

Life without HowNow

The use of folders in Windows Explorer is an attempt to be able to filter views of documents so that you can see, for example, only documents that relate to a particular job, year or matter. The intention is 'to separate the wheat from the chaff' so you can look at only the relevant documents.

Life with HowNow

Even though HowNow saves files to your desired folder structure behind the scenes, you can display on the one HowNow screen the contents of any or all folders for a client or topic. You can then filter your view in a variety of ways which is much more flexible than using folders as filters.





12 **"It's so tedious to find things on our system"**

Life without HowNow

The 'using folders as filters' approach described above results in the 'pick a folder, pick a folder, pick a folder' search that wastes time and often proves fruitless. 'Reinventing the wheel' starts to become a near daily practice.

Life with HowNow

Once you and your team start using HowNow you will wonder how you ever put up with 'the old way' of finding documents and files. We consistently receive 'My team just loves HowNow' level of feedback from clients.

13 **"It's got to be in there somewhere. I know I saved it."**

Life without HowNow

Maybe you saved it into the wrong folder? Under the wrong client? In Windows Explorer and folder/'browse-to' retrieval systems, that file is as good as gone. You might be able to find it, but is it worth time it will take?

Life with HowNow

Click on your name. Click a date range. There's everything you saved, no matter 'where' it is on the system. You could even filter further, say, on document type (email, Excel, PDF, Word, etc.) or type a keyword to filter the search results further. You can then re-file under the correct client.

14 **"I wish I could see all files for this client on the one screen"**

Life without HowNow

Windows Explorer and many so-called Document Management Systems only allow you to look in one folder or under one client at a time.

Life with HowNow

The search in HowNow is easy and flexible. Here are some example searches you can do within a couple of seconds. Show me:

- All files for this client
- All emails for this client
- All Excel files for this client
- All files that I created for this client
- All files yet to be completed for this client
- All files awaiting my approval for this client
- All files across all clients awaiting my approval

None of these searches requires you to know where (i.e. which folder) the files are saved; and you can look in multiple folders at the same time.

15 **"We need Quality Assurance controls on our documents"**

Life without HowNow

Documents are sometimes sent out without the proper QA checks being done. You have no way of stopping unapproved documents from being sent.

Life with HowNow

You can specify on a per team member basis who is allowed to approve and finalise documents. This gives you an excellent level of QA control.





16  **"Who has worked on this document? Who approved it?"**

Life without HowNow

Life with HowNow

It can be hard to know which team members have been involved in the creation and quality assurance of documents. When errors are found in documents it can be a forensic exercise to find out where in the process things went wrong.

HowNow automatically creates an Audit Trail in the background, recording the who and the when of who created each document, who opened it, who reviewed it, who approved it, who finalised it, who printed it, who emailed it, and so on.

17  **"Which version of this document is the most up-to-date one?"**

Life without HowNow

Life with HowNow

Version control is difficult. Emailing a document or spreadsheet to a colleague creates a copy of it. When they edit the attachment and email it back to you, there are now three versions of it. What if you edited the original version in the meantime? There's a 4th version. What if you emailed that original file to more than one person? Before long, the 'Which is the most up-to-date version?' becomes difficult to track. Such version control problems might result in you losing your work. You might overwrite another's changes. Ouch.

HowNow eliminates version control problems. In the Knowledge area of HowNow (which houses your procedures, policies and templates), your team members can only access the 'Current Edition' of each document. This gives them—and you—the assurance of knowing they are working off the approved and up-to-date version. In the Records area of HowNow version control problems cannot arise because only one person can edit a document at a time. When collaborating, you can email *links* to files instead of emailing around attachments.

18  **"We need some Standard Operating Procedures around here"**

Life without HowNow

Life with HowNow

The way things are done in the business is not consistent. The 'This Is How We Do It Here' procedures and processes are not documented; they reside in peoples' heads. This reduces quality and increases the business' risk of losing that knowledge through staff turnover.

Your procedures are documented and stored in the Knowledge area of HowNow. Staff can only access the approved up-to-date version of each procedure. There is consistency across the business in the way things are done.

19  **"We need an intranet to keep all the staff up to date"**

Life without HowNow

Life with HowNow

There's no central 'staff news' system, other than emails. There's no simple staff directory with phone extensions, emails and other staff contact information. Team members are unaware of what new systems have been documented, which procedures and templates have been updated, what has been changed, and why.

The Home screen in HowNow lists out news that applies across the business and to the logged in team member. It also displays any new or updated documents in the Knowledge area,, keeping everyone up-to-date with what has been added or changed and why. It even shows upcoming team member birthdays.





20  **" Training up new staff members is so time consuming"**

Life without HowNow

New team members take a long time to train up because the knowledge that's in peoples' heads need to be transferred person-to-person; there are no easy-to-follow and easy-to-find procedures to facilitate very efficient and cost-effective training of new staff.

Life with HowNow

Training times reduce dramatically. The 'My Procedures' view in HowNow gives each team member the equivalent of their own procedures manual. This is easily keyword searchable and the steps in procedures link through to the related templates required to perform each step.

21  **" The left hand doesn't know what the right hand is doing"**

Life without HowNow

There is no 'One Place' to store the business' procedures, templates, emails, correspondence and other records. Information is all over the place in separate 'information silos' like peoples' email Inboxes, their My Documents, etc. This fragmented storage and record keeping means there's no way a person can see the complete picture of documents, correspondence and records that relate to a particular client.

Life with HowNow

HowNow provides the 'One Place' for electronic storage and retrieval for the entire business. This makes it easy to see the full picture of documents and records that relate to a particular client or team member, regardless of which team member(s) filed the documents.

22  **" We need to standardise. Everyone is doing their own thing."**

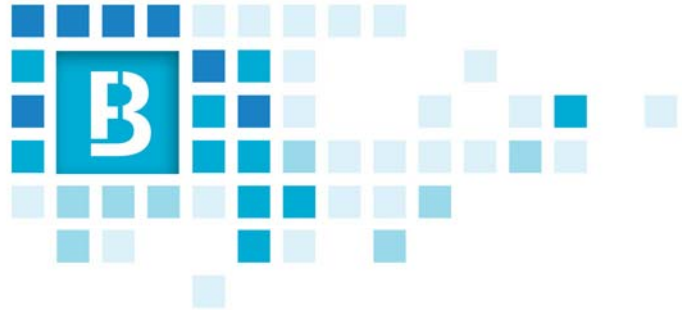
Life without HowNow

There is no centralised storage system for templates for things like quotes, proposals, standard letters, Excel templates, etc. Team members save their own versions of such documents on their own computer or drive. This means that different people are doing things in different ways and using different documents and tools, despite them being in similar roles.

Life with HowNow

Go to the Knowledge screen in HowNow, type a keyword or two and you find what you're looking for. You can click on a Document Type filter such as Procedure, Checklist, Form, Letter or enter a file extension like .doc or .xls to filter the search results further. The Knowledge screen only displays the up-to-date version of each template to ensure standardisation across the business.





Benefits of Implementing a Document Management System

There are many reasons why companies implement Document Management Systems. Some of these include:

Save Time

- **Retrieve documents in a fraction of the time** that it takes using paper files or Windows Explorer
- **Quickly and easily create merge documents** such as letters, checklists and reports with client data automatically inserted
- **Use templates and precedents** to make jobs quicker to complete and quicker to review

Save Money

- **Saving 20 to 30 minutes per person per day** quickly adds up to improved productivity and profitability (See *Something to Think About* on p11.)
- Save money by **freeing up office space and eliminating off-site storage** currently used for paper files

Reduce Risk

- Comprehensive and systematic record keeping **reduces risk**:
 - Consistent **centralised filing of emails and file notes** across the entire business
 - Audit trail function provides **automated record of quality assurance process** for each document
- **Improve standardisation**, consistency and quality through the use of templates and precedents

Improve Communication

- All staff can quickly and easily see all documents, emails, files notes, etc. relating to a client
- Remove need to email and 'CC' work colleagues in regarding progress of client work
- Dramatically improve—and essentially *automate*—'knowledge sharing' about clients



Increase Management Control

- View a list of **all work-in-progress documents** across the business and be **able to filter** that based on:
 - Who is working on it, who is to review it, who is managing it, and/or
 - The status of the document – e.g. Draft, Review, Approved, Out For Signature, Final
- Reduce **key person dependence**
 - When people are away or leave the company, easily view all the documents, emails and file notes they have filed and have been working on
 - Standardise processes through use of procedures, templates and precedents

Increase Company Value

- A systemised company with good Knowledge Management and Document Management systems attracts a **higher valuation** because such systems **make succession easier** for the new owner(s).





Something To Think About

The time currently being wasted each day in your business ...

80% of employees waste an average of 30 minutes per day retrieving information while 60% are spending an hour or more each day duplicating the work of others.

BAE Systems PLC study referenced within
'Show me the Money, Measuring the Return on KM' Knowledge Management

In a poll of 44 accounting firms that were not using a Document Management System, 43.2% of the firms estimated each person in the firm was wasting approximately 15 minutes per day looking for files. 40.9% of firms polled estimated each person was wasting 30 minutes per day looking for files. Combined, this equates to 84.1% of firms estimating each person was wasting on average 22 minutes per day looking for files.

Source: Live poll of 44 accounting firms conducted during businessfitness webinar

'Stop Exploring, Start Finding held 14 February 2008

Are you looking for the *cheapest* Document Management System? Or the best *value*?

"It is unwise to pay too much but it is worse to pay too little. When you pay too much, you lose a little money - that is all. When you pay too little you sometimes lose everything, because the thing you bought was incapable of doing the job it was bought to do. The common law of business balance precludes paying a little and getting a lot. It can't be done. If you deal with the lowest bidder, it is well to add something for the risk you run. And if you do that, you will have enough to pay for something better"

John Ruskin (1819-1900)



What People Are Saying About HowNow®

*"Using HowNow is a much quicker way of retrieving files than the way we used to do it through Windows Explorer and by asking others around the office. We no longer have to go to the next office and ask a colleague "Where did you save that file?" because **in the time it would take to walk to the next office, I have already found it in HowNow.** It's just like searching Google.*

*"HowNow has actually created a natural gravitation towards a 'paperless' way of doing things because **we don't even have to try to 'think paperless', it just happens.** For example, when I am working away from the office using remote access in the past it would happen where I'd think to myself, "Bother, I should have brought that physical file with me so I can refer to inbound documents," well that issue is completely gone because everything is now scanned and easily located.*

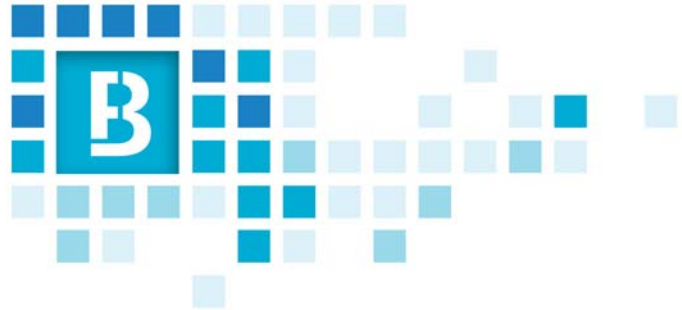
*"The '**shareability' and accessibility of client information has improved dramatically** thanks to HowNow. It's almost like—and this is deep!—we're a step closer to a common firm consciousness on client matters. HowNow has changed the way communication happens here about clients. Rather than the old linear way of communicating by sending emails to particular people within the firm, **everyone across the firm now simultaneously know what's happening with a client** rather than relying on email or accidental face to face encounters. With HowNow you can see it all there on the screen rather than waiting for face time with busy people.*

*"I can work remotely and watch the firm's day unfold on HowNow's Records screen. I can see every document, workpaper, email as it is created each day. From there I can tell what is flowing smoothly and what isn't. I can see situations where a team member might need some help or guidance on a job to push it through. Team uptake of the precedents with HowNow Knowledge Manager has been slower than we had hoped. **With Records Manager uptake has been instantaneous.** I now only have to access Windows Explorer about once a month. HowNow keeps everyone out of Explorer which is great. Windows Explorer is too brittle and dangerous for staff to be in there.*

"Gladly, it's not just me. My staff are telling me HowNow is fantastic."

Cameron Patterson

Principal – Cameron Patterson & Co



"HowNow is an integral part of our induction process with new team members. Having standards and systems in HowNow allows our team members to become productive so much faster. We recently employed a new team member and on the second day she was performing tasks unsupervised because she was following the processes in HowNow."

Kelley Malaba

Southern Cross Accountants

"We tell all of our business colleagues who are looking for a better solution to document management to do one thing: call businessfitness and ask for a free HowNow demonstration today! It will be the telephone call that makes document management a breeze!"

Tricia Velthuisen

Churchill Education (previously Train to Succeed)



Your Next Step – A Demonstration of HowNow®

To see specific examples of the features outlined in this white paper, please contact your local distributor, Angela Murphy, on **(08) 8272 5620** or email amurphy@dmca.com.au to **arrange a time for a Custom Demonstration of the HowNow Knowledge, Document, Email and Workflow Management System incorporating HowNow MailScan and Client Portal.**

There is **no obligation** to proceed further after this 90 minute session which can be easily conducted via a meeting over the telephone and web.

HowNow®: The Document Management System developed by businessfitness®
Distributed by dmca Pty Ltd www.dmca.com.au
Australian specialists in Document Management Systems and Paperless Office

