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# How to Streamline your Business Processes using Document Management



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# Introduction

Small businesses today are inundated with information—including content created internally as well as documents and files received from customers, partners and suppliers. Without an information management framework, time is wasted searching through file folders and various business systems for business-critical documents. This is often compounded by the proliferation of multiple versions of the same file, which results in errors and repeated work.

When it comes to managing vast amounts of information—such as proposals, plans and contracts, product and inventory catalogues, order forms, invoices and receipts, building plans, support tickets and personnel records—small businesses simply cannot operate at maximum efficiency without the ability to easily search, share and protect their critical files and documents.

In addition to the sheer volume of files being produced by a variety of sources, today's "content chaos" challenge is further compounded by the fact that the data typically resides across an increasingly complex landscape of applications, network folders and devices. Dedicated or "best of breed" information management solutions abound, adding to the complexity because of their limitations, instead of alleviating it on an organization-wide scale. The ability to effectively manage and harness business-critical information at any time and from anywhere—using a single, centralized system—is essential not only to day-to-day operations, but also for long-term growth and small business success.



## The Information Management Challenge

Similar to larger corporations, it has become increasingly vital for small businesses to devise processes that facilitate smooth operations and ensure consistent workflows across the entire organisation. But often, as these processes are implemented, new information silos are created, which further complicates the task of managing an organisation's collective data.

Simply put, empowering employees to quickly and easily locate the exact content they need, regardless of which business application it resides in, leads to better decisions, faster results and improved collaboration. When small businesses can ensure that the right content is in the right hands at the right time, they can focus on using information to drive growth, value and innovation.

This paper will explore real-world examples of how small businesses are using the M-Files enterprise information management (EIM) solution to eliminate information silos and breaks down the barriers between employees and their information, in order to facilitate growth. In all of these cases, a strong need existed for scalability in order to start small with their EIM initiative and expand gradually. At the same time, these smaller organizations also demanded simplicity and ease of use to drive company-wide adoption, along with the sophistication required to support the long-term needs of their growing businesses.



## Finance: Automate Billing Processes

The finance department is the epicentre of a business's operations, ensuring that accounts are properly billed and paid in a timely manner. One of the greatest benefits small businesses can experience as a result of implementing EIM is to automate accounts payable and invoice processing workflows. Automation not only eliminates manual handling of payables and receivables, but also the human errors that manual processing can cause. In addition, automation reduces the time and cost of financial operations, helping small businesses maximize existing resources and do more with less.

American Solutions for Business (ASB) is a fast-growing print and promotional products distributor with hundreds sales associates and thousands of suppliers throughout the US. Using M-Files, ASB was able to provide access to invoices by authorized individuals directly from other business applications, such as PeopleSoft. As a result, they were able to optimize vendor invoice processing times, execute quicker returns on record requests and streamline the movement of documents throughout the organization. ASB estimates having cut invoice-processing times by three days, with the added ability to monitor the entire process with great precision.

Another area that can benefit from automating via an ECM system is the process for managing corrective and preventative actions (CAPAs). Auditors look for the gap between what a company does and what the procedures say they do. Unavoidably deviations occur, ranging from minimal to calamitous—and when a deviation occurs—the related CAPA must be defined, documented and communicated. The CAPA must then be tracked to verify that the impacted individuals have read and understood the new SOPs associated with the CAPA. The right ECM solution will provide updated tasks as needed for improved corrective management and ensure all affected staff members have read and understood the updated SOP. It takes the guesswork out of the process.



### **HR: Streamline Hiring Practices and Collaboration**

In human resources (HR), managing employee records and learning requirements can be made easier, faster and more secure using an EIM solution. Also, EIM provides organisations with a centralized platform for managing all of the processes and paperwork that support the HR function including recruitment, on boarding, training and performance management.

SRSI is a small business, located in Andorra that provides HR services to clients all over the world, managing everything from hiring processes and employment contracts to payroll and membership insurance. For every client project, SRSI handles between 15 – 20 documents per employee, all of which are managed by an administrative staff of only five. In total, this team creates, sends, shares, updates and stores more than 7,000 documents each year.

Without a centralized system in place to track and manage documents, the process of completing employee paperwork was both time-consuming and prone to manual errors. SRSI tapped M-Files to organize all of its existing business information, and the company can now process a document four times faster than it did prior to implementation. Having made a complete transition from paper to electronic document management, SRSI reduced file-processing times while also optimizing hiring procedures and employee collaboration. Administrative staff can now quickly and easily access all necessary HR documentation, which remains secure in a controlled environment and with a versioning system that tracks and timestamps all modifications. Using M-Files, SRSI also automated highly repetitive tasks such as pay slip sending, and streamlined HR-related workflows to improve administrative efficiencies.



### **Legal: Simplify Contract Management**

The process of managing contracts can be challenging, particularly when you consider how many different organizations, departments and individuals are typically involved. Today, there are a number of ways in which companies are completing the task of contract management. Some organizations use an end-to-end business system such as SAP, while others rely on Excel spreadsheets. But regardless of the approach, the process of contract management can be simplified, automated and improved using EIM.

Krogus is a Finland-based company of independent claims managers, loss adjusters and surveyors, providing claims management, surveys, recoveries, IT and related services to clients throughout nine European countries. The easily configurable architecture of M-Files allowed Krogus to build a customized system designed to meet their unique case management needs. With M-Files, Krogus has overcome the challenges of organizing and sharing information across globally distributed offices and client locations, and the company's employees now have instant access to the latest

versions of ongoing case data and information, including all related claims documents and email correspondence. In addition, they can securely publish information and collaborate with clients about the latest claims status update. Data is securely stored and replicated to all offices in nine countries, and with sophisticated previsioning capabilities, employees only have access to the information associated to their assigned cases.

Another example of the benefits experienced by automating contract management is demonstrated at R-kioski, a Finland-based grocery and convenience store chain with approximately 650 outlets throughout the country. Approximately two thirds of R-kioski's shops are located in rented properties, while the remaining are owned by the chain. Contracts for all 650 stores are managed by the chain's Establishment and Construction Business Unit, which has deployed M-Files for contract management to organize documents and simplify the process of working with and reporting to retailers.

Prior to 2013, R-kioski's contract documents were typically stored as hard copies in various folders and file cabinets, or they were scanned and the electronic versions were saved in network drives. On occasion, documents even resided with just a single employee, making access difficult for others across the organisation. Manual processes also made it time consuming to locate business information and added additional layers of complexity for R-kioski's retailers.

With M-Files, the management of all documents – everything from purchase and leasing agreements to articles of association and general meeting minutes – is now handled in an automated fashion. Simple retrieval by R-kioski's Establishment and Construction Business Unit is made possible through the use of uniquely identifying search criteria, such as retailer, address, rental period, price, floor area and contact person. This level of automation has not only saved time and improved operational efficiencies, but it has also enabled R-kioski to monitor all of its retail stores in real time and respond faster to changes (such as rental agreement expirations) with custom alerts and notifications. With more than 65,000 square meters (700,000 square feet) of stores to manage, M-Files has helped R-kioski tame its sprawling web of contract documentation to operate faster and in a more proactive manner.



### Customer Service: Optimize Accuracy and Response Times

Utilizing EIM to automate front and back-end office processes ultimately has a positive effect on the customer experience. When employees have fast access the right customer-related information, issues can be resolved expeditiously and satisfaction improves.

For example, Stearns Bank processes more than 1,000 loans throughout the U.S. every year, but its existing document management system was outdated, drawing on disjointed and inconsistent data and creating inefficiencies across the workforce. As a result, much of the bank's loan approval processes were still completed manually, which resulted in longer than necessary loan approval cycles.

Now with M-Files, bank employees have accurate loan application information at their fingertips, and consequently, Stearns Bank is now able to process loans faster and respond to their customers with greater speed and efficiency.

Another example of how EIM can positively influence the customer experience is demonstrated at Microbiologics, a Minnesota-based biological controls company.

The company selected M-Files to automate all of its customer account-related documents. By scanning its historical records into M-Files and transitioning from paper to pure electronic processes, Microbiologics' customer service representatives can now immediately address incoming inquiries from its global customer and distribution partner base. In the past, records resided in different formats and locations, making it difficult for customer service personnel to gather all the necessary data to resolve outstanding customer issues in an efficient manner. Now, representatives can instantly locate the needed records from their desktops by conducting a simple search from within M-Files or

NetSuite. As a result, the customer service department runs faster and is more responsive, replacing paper-based processes with new streamlined approaches to information management. M-Files also provides the necessary evidence of document control and process management necessary to maintain compliance with FDA regulations and ISO 9000 quality standards.



### How to Get Started: Next Steps for Small Businesses

Small businesses have more agility to respond to changes in the market, but doing so effectively requires fast employee access to business information, along with the ability to automate manual business processes.

While dedicated or “best of breed” solutions can address this challenge department by department, they are limited in scope. Only EIM has the capacity to provide a single, centralized solution that serves as a cross-departmental workhorse that benefits the entire organization.

EIM supports the information management and expedited workflow automation needs that are critical to ensuring quality and consistent levels of service as the company grows. With the ability to organize, search and manage the vast universe of business information, businesses can streamline workflows and create efficiencies across accounting, HR, legal, and customer service teams, improving the speed at which business is conducted, as well as the end customer’s experience.

To learn more about how automating and unifying business information can benefit your small business, please contact your M-Files Representative.

## About CIMS

Casto Information Management Systems, a Global Technology Solutions Company was founded in 1996 and is owned and operated by founders, Ron and Connie Casto. For more than two decades, CIMS has been a leading full-service document management solutions provider delivering document management, business process workflow, paper and e-document capture, forms processing using OCR, ICR, and Mark Sense recognition, Accounts Payable automation, case management (DCM), robotic process automation (RPA), and ISO 9000 solutions. CIMS uses tested, proven, and scalable software tools to leverage technology that delivers complete turnkey solutions, that improve productivity, enhance collaboration, and reduces manual labor.



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