



5 Myths About Document Management

March 5, 2020



With technology growing at an exponential rate, it's almost impossible to keep up with every new tool, platform, or system being offered to your business. Sometimes, a new technology seems too good to be true, and business owners will write it off before ever giving it a chance. This is a big mistake that too many companies are making.

Even if a technology seems overwhelming at first, you'd be amazed at how little time it takes to understand it at a high level. Document management is no stranger to this issue—many times, we've had

clients express many different concerns about document management, and we wanted to set the record straight.

We've put together the top five myths we continue to hear about document management to help business owners understand that it's not as complicated as they make think—and how it's definitely going to be more useful than painful in the long run.

Myth #1: We've been using paper for years—it's too much of a hassle to migrate from paper to digital document management.

You're not alone in this. Everyone has been using paper; it was the best option for so many years! There's no getting around that you have to capture and scan your old documents into your new document management system, but it's not as bad as you think it might be. Many of your old documents may not need to be transferred, and it's always important to remember that this is a *one-time overhaul* that won't ever happen again. It's a small price to pay for the magic of digital document management.

Myth #2: I need an entire IT team to implement a document management system.

This is simply not true. An IT team can be helpful, but if you choose Optix as your document management solution, we bring the team to you. Our experts help your entire organization get up and running; that includes implementation of the system as a whole, advice on capturing and scanning both old and new documents, and ongoing training for further use. We also build customized indexing and query screens designed to allow your users to quickly find documents using familiar terms and values, keeping your processes streamlined.

Myth #3: An “out of the box” document management system is the easiest to use.

“Out of the box” systems are known for being easy to use for one reason: You don't have to change anything. But that's part of the

problem. Every business is unique, and a one-size-fits-all solution rarely works universally well to justify the cost of the system. A document management system like Optix that allows for multiple configurations and applications using the same platform and easy-to-use tools to customize each part of your system is going to give you the most bang for your buck. It's going to work for you exactly as you want, instead of you trying to work within the limitations of an "out of the box" system. Our experienced team will quickly tailor the solution to your needs, and you'll be amazed at how easy and intuitive it is to use.

Myth #4: My business is too small to justify purchasing a document management system.

No business is too small! In fact, if you think in terms of [small businesses](#) needing to stay lean and operate within resource constraints, investing in a document management system is a great way to support your business's growth and to compete with big companies. Think about how much your office spends on paper yearly, and cut that number by more than 80%. Over just a short period of time, the cost of a document management system will more than pay for itself with the benefits it provides your business.

Myth #5: I can shred all of my old paper documents once my document management system is in place.

Don't reach for the shredder just yet. We recommend breaking your paper documents down into three categories:

- Those that are required by law to be in paper form.
- Those that you may need to still be in paper form pertinent to routine business operations.
- Those that you will definitely not need in paper form.

In this case, take the third group and head for the shredder whenever you're ready. Then, over time, many documents in the other two groups can be shredded as well. But it's always good to work with

caution, especially with legal documents or ones for which you may need to hand out a physical copy.

Final Thoughts

We understand the concerns that many businesses have when it comes to adopting a new technology. That's why we've put together a team of document management experts to help you on your journey. A new document management system can streamline your processes, reduce storage and paper costs, simplify routine tasks, and generally save your entire business hours in its week. It's much more than a technology—it's a digital transformation.

[Contact us](#) today to learn more about Optix and the next steps for implementing our document management system.