



# How Small Businesses Can Benefit from Document Management and Workflow Software

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One of the biggest mistakes a small- or medium-size business can make is thinking that it isn't large enough to automate its processes and build workflows for its documents. This is simply not true. A company of any size can benefit from becoming more organized with digital documentation.

Even more importantly, smaller companies need to digitize their processes to compete with larger companies. Always on the hunt for ways to level the playing field, smaller companies need to be gauging document management and workflow software as a budget-friendly and highly effective solution. For example, a good document management and workflow solution is essential to securing leads—if prospects see that your process is slow and tedious, they'll simply do business with another company.

There are three main areas where a digital process would be beneficial: accounts payable, human resources, and sales. Let's take a detailed look at how each of these three areas could be improved through a document management and workflow solution, along with the general time savings you can expect from digitizing your processes.

## Reclaim Lost Time

Do you wish you had more hours in your day? With a document management and workflow solution, tasks that once took hours and days can be reduced to a fraction of that time. The initial setup does take some time, but it's a small price to pay to improve your entire time management process.

By utilizing a document management and workflow solution, you suddenly have the ability to spend more time on your leads or other tasks that need your attention, which will in turn increase engagement and ROI.

Let's take a look at the three areas that benefit from a document management and workflow solution the most.

### **Accounts Payable**

Even as other areas in your business become paperless, it seems like accounts payable is still stuck under a mountain of paperwork. It's a

people-intensive process that usually drains a significant amount of time. This can become costly, causing stress for financial executives during budget discussions. Luckily, there's a solution to digitize your accounts payable, reducing the number of employees and time required to complete your day-to-day processes. With templated documents and customized push options, your documents can land in the inbox of a designated person with just a few clicks of a button.

## **Human Resources**

Another source of never-ending paperwork for human resources is constantly managing and storing hundreds of documents per person. A paper trail for each employee begins even before they're hired and remains long after they've left. And all of this paperwork needs to be stored somewhere for the future, just in case. With a document management and workflow solution, that endless trail of documents is reduced and stored in one simple and organized location. When new documents are needed, they can simply be pulled from the template and pushed to the right person. Throughout the entirety of a given document's lifecycle, you can see where it currently is and what work is being done with it, to help you stay on top of its journey.

## **Sales**

There's no better way to manage and organize incoming leads than with a document management and workflow solution. Especially with marketing campaigns, leads need to go to the right person before an opportunity has expired. During the beginning stages of a lead, a workflow solution can make sure the right person follows up quickly and with the right automated documentation.

After a sale has been closed, a document management and workflow solution can help keep any and all important documents organized and in an easily accessible place. That way, the contract goes smoothly and without any hiccups in agreements due to misunderstandings.

# Getting Started

The beginning of a digital transformation is always the most intimidating part. Companies should start by evaluating their current processes and workflows to identify the areas that need the most attention. Setting specific objectives to achieve, along with reasonable expectations is also pertinent. Here's an example of a concrete goal: "We want to reduce the hours needed for on-boarding a new client from 8 hours to 1 hour." This is a great way to measure success with a new document management and workflow solution.

*Interested in learning more? [Contact us](#) today to receive a demo of Optix, a document management and workflow solution that can help you recover lost productivity and optimize how you store and organize important documents and data for your business.*