



Questions to Ask Before Purchasing an Enterprise Content Management (ECM) Solution

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Whether you are looking to find a new document management and workflow vendor or to simply from scratch, finding the right enterprise content management solution for your business or organization takes time. Regardless of your industry, each vendor and its solution needs to have the right tools and customization to work uniquely for you. A

little online research can be helpful, but you need to be sure you have the right outline for what you are looking for.

To take some of the burden off your shoulders, we have compiled a list of questions that can help you with your document management and workflow vendor search. Be sure to pinpoint the exact tools you are looking for and ask each vendor these questions.

1. How much downtime should I expect?

Migrating all of your documents to a new system and setting rules is going to take time—it is part of the process. While it is normal to expect downtime, a little preparation ahead of time can make the transition much easier. Ask each vendor how long they expect the migration process to take, and what steps both of you can take to reduce the amount of downtime you will experience.

2. In what industries do you have the most experience?

Different document management and workflow vendors have expertise in different industries. If you are a higher education organization, you want to be sure that your new vendor has significant experience in your area and the references to prove it.

3. What type of support and training do you offer?

Make sure that you look at both the license *and* training cost of the vendor. The license cost may not represent the total cost of the project—you also need to consider training costs. Make sure the

vendor you choose has the right training and support to fit your specific user base. Additionally, they should have support available during your business hours in case you need immediate assistance. And always ask where the vendor's support resources are geographically located. It is already difficult enough to train your team to use a new solution, so if the support does not match your needs, it can end up being more frustrating.

4. What features set your solution apart from others?

This one may seem obvious, but it is nonetheless important. Ask the vendor for a brief explanation of the key features that make their solution special, as well as why choosing them over others is the right decision. This is where you should specify the features you desire to make sure their solution matches your needs. Keep a list of must-haves and wants on hand so you can look for not only what you *need* but also some helpful secondary features, in case they are also offered.

While you may want to ask more questions than what we have above, we believe these four are a good starting point. If possible, you also want to get a good demonstration of the user experience for each solution to make sure it looks and functions in a way that is easiest for your team. There are many enterprise content management (ECM) options out there, but only a select few are made to fit your unique needs.

[Contact us](#) today to learn more about choosing the right ECM solution for you and what Optix solutions we have to fit your needs.