



Scaling Your Small Business Operations with Document Management Software

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Thinking about scaling your small business but don't know where to start? When scaling a business, it's best to consider the big picture. Start by asking yourself: What will help my business for years to come? The most valuable early investments are usually found in tools

and systems that will optimize your business processes and allow you to maintain structure and stay organized. Document management software is a worthwhile investment and will allow your team, big or small, to organize and share your documents while maintaining streamlined communication within your business.

Growing your small business can certainly be a challenge—it's best to tackle those challenges [step by step](#) to not get too overwhelmed. Organizing your back office and document processes is a critical step that helps other challenges become easier, if not resolved. With user-friendly document management software, you can prepare your business operations for expansion by ensuring that dissemination of information doesn't add to an already complex process.

Here at Mindwrap, we help guide you through the process of implementing a document management system for your growing business. It's so important to prepare early and often for the growth of your small business with tools to aid communication, organization, and optimization; which is why we've developed a tool built to house your documents, allowing information to be created, shared, organized, and stored effortlessly. In this blog, we will talk about the different ways that document management software can transform your business and help you move forward.

Managing Your Documents

As your business grows, so will the number of documents and files you need to store and share information throughout your organization. Storing your documents in a filing cabinet might have worked when your business had just a few employees, but as you grow, you will need management software that is widely accessible by multiple users. By implementing document management software early, you give your organization a head start as your business operations become increasingly complex.

Document management is the process of capturing, identifying, and storing a document the moment your business encounters it, eliminating many of the difficulties associated with managing paper copies. As a growing business, you don't want to waste time tracking down paper files; you need them to be accessible and organized the moment you go to retrieve them. If you are moving offices as your business grows, you won't want to go through the hassle of transitioning paper files. That is where document management software comes in handy—having all of your documents in a secure, accessible, from anywhere platform would allow you to move offices without one document lost.

If you're currently using paper files and are worried about converting a paper document to a digital format, fret not! With Optix, a powerful, user-friendly document management software, document scanning is a straightforward process to go [paperless](#). With Optix's document-scanning feature, you will be able to create and maintain a digital filing system. Having this system can help make sure that you will never lose a document again.

Document management is not only a solution for your previous paper files—it applies to any media that can be stored and indexed; This could be audio files, videos, or electronic artifacts.

Tailored and Optimized

Whether you're changing systems, adding team members, or moving location, your business will have to shift its processes to continue growing. As these changes happen, you will need to have an easily configurable business process that better enables efficient workflow.

Each business is unique; workflows or processes are not one-size-fits-all. Document management software, like Optix, can help optimize your unique business processes. This could be through configurable workflows or queues. With Optix, you can create custom queues for

your own purposes and easily script the handling of items to be processed. The value of these workflows is that it will optimize your business's communication and allow documents to stay organized and efficient.

Having these easy-to-use configurations within your document management software will make your business processes far more efficient and effective. These can help within all areas of your business: accounting, manufacturing, marketing, human resources — you name it. Having a system that flows with your business processes and can be configured easily to your business requirements is necessary when working with a growing business.

Communication Through Workflows

Workflow automation can be one of the most beneficial parts of implementing a document management system for your growing business. With your growing business, there will undoubtedly be a more urgent need for organization and processes to ensure your business stays organized and efficient.

Great communication is a vital aspect of every successful business. Without a standardized flow of communication, businesses can quickly become chaotic and unorganized. With workflow automation, your organization can streamline communication even further. This can include ensuring that whoever is assigned a specific task must take the next appropriate steps before the document will proceed through the process.

Optix workflow automation offers many features that can be beneficial to your growing business. The “Delegation” feature allows you to redirect over documents to one or many colleagues while setting individual tasks and deadlines. For example, let's say you need one of your colleagues to sign a document for your office expansion. With Optix, you'll be able to assign the document to them and they will

receive a notification that they have been assigned a new “task. This can help ensure that it gets signed and moved forward by the deadline date. There are many other [Optix features](#) that can help with your automated workflows as well.

Automated workflows can eliminate time-consuming manual processes, dramatically increasing efficiency and productivity. As a growing small business, consider your document management processes as one of the best places to address scale and growth. You want a system that you can trust to improve your processes *and* a system that can grow with you throughout your journey. Here at Optix, we provide you with the tools, support, configuration, and robust technology you need to grow your business.

Questions on how to start the process? [Contact us](#) today and we'd be happy to discuss what a transition looks like for many of our past clients. See in real-time how small businesses can transform their document management with Optix.