



Universities: Getting Started with a Document Management and Workflow Solution

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You're drowning in paperwork and losing productivity searching for documents you know you have but can never find when you need them—and you've found the right solution. You know that a document management and workflow solution can streamline your processes

and documentation, but you haven't quite figured out how to get started. We can help!

Let's go through the timeline of your document management and workflow solution lifecycle. We'll also show you the best way to get started and convince your team why you should digitize your documentation process to relieve the headache of the never-ending stream of paperwork.

I Need a Solution

Universities everywhere are turning to digital documentation for most, if not all, of their processes. With thousands of new and returning students each year, there's only so many file cabinets in the world. You've researched what can help you get out from under this problem, and you've stumbled upon a document management and workflow solution as the answer.

One great way to showcase how a document management and workflow solution can improve your documentation processes is to consider real-world problems that you face on a daily basis. Take an everyday task, or a more difficult one, and give a quick presentation to your team or decision-makers on how a document management and workflow solution can transform that task from being monotonous and tedious to quick and efficient.

Where Do We Start?

Once your team is on board and you are ready to implement your document management and workflow solution, you want to start off slow enough that you don't get overwhelmed with the integration process. Start with a process that is easily solvable without too many steps so you can get used to the different aspects of your new solution.

Additionally, you want to have a new policy and any procedures set up ahead of time before others begin using the new software. While digitizing your document process simplifies almost all of your tasks, it is a new way to do things—and some team members may struggle in this area. Be sure to choose a document management solution that has great customer service and training for all of your team members and can cater their training to a specific type of learning that may benefit struggling team members.

Educate the Masses

Students, faculty, and staff, are going to be adjusting to this new digital documentation process. While it may be more of a shock to those in the office and working with paperwork every day, nearly everyone will have their hand in it at some point. Offer some office appointments or group presentations that anyone can view where you go over the basics of why you've made the switch, how it will benefit the school and everyone involved, and what they need to know.

You'll be surprised to see how many people participate and genuinely take interest in this process. Many may have been bogged down by paperwork in the past and will be happy to see that the university is making an effort to simplify a usually tedious part of their school experience, for faculty and students alike.

Enjoy Your New Digital Document Process

It may take a few weeks to adjust, but with the right document management and workflow solution, you will back up to your usual speed (and faster) in no time. With great customer service and training, you'll experience almost no downtime during the implementation process.

If you're still on the hunt for the right solution, [contact us](#) today to learn more about Optix, a document management and workflow solution designed to optimize university processes. With excellent customer training and service, moving to paperless has never been easier. Get started today and be up and running in no time!