Common Mistakes in Implementing a DMS and How to Avoid Them

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Ready to get started implementing a document management system (DMS)? Great! By now, you have probably done some research on DMS's, what features they provide, how much it would cost, and most importantly, which one best fits your business needs. Now that you have done the research and are ready to implement it, there are a few things you need to know about common mistakes businesses make when implementing their DMS.

The implementation of a DMS takes time, effort, and patience. Most companies rush to implement because they want to get started right away, which is understandable but rushing into implementing a DMS can lead to many mistakes that you might have not even realized.

Here at mindwrap, we have decades of experience in creating and implementing DMS software. We have come across many mistakes companies have made throughout our years when deciding to implement a DMS. This blog will go over the top mistakes made when implementing a DMS and how you can avoid them.

Common Mistakes

A DMS plays a vital role within your business organization, process, collaboration, and document security. If you are going to put money, time, and effort into implementing a DMS, you want to make sure that you are prepared. Implementing a DMS can have its fair share of challenges. However, although it is challenging and mistakes can come up, it doesn't mean that you can't prepare yourself and take steps to prevent these mistakes from interrupting your implementation.

Jumping into Cloud-Based

Throughout your journey in finding the perfect DMS, you have probably come across the phrase "On-Premise vs Cloud Based." This indicates whether you want your DMS housed on your local private server or have it hosted in "the cloud." Both have benefits and drawbacks depending on your business needs. One of the biggest mistakes we have seen is businesses rushing into a cloud-based DMS when on-premise is the better option.

At first glance, cloud-based DMS seems like the easier, faster, more cost-effective solution, which is why many companies are quick to jump on it. However, that is not precisely the case. For example, if you are a bigger company with high-security protocols, going with a cloud-based DMS could be risky since it isn't hosted directly within your data center. Therefore, you want to make sure to research both options thoroughly before making your decision. Remember to keep your business process and requirements in mind when making this decision. A well-rounded DMS will have both options and might even provide a hybrid option as well. If you want to learn more about the pros and cons of on-premise vs. cloud document management, be sure to check out one of our latest blogs.

Scanning and Indexing

To properly implement a DMS, your documents need to be digitized, which means you will either have to outsource for scanning or do it yourself. When people are looking for a suitable scanner, the main issue is that they think they need a super-fast scanner to digitize their documents quickly. This usually ends up in a realization that it doesn't matter how "fast" your scanner can scan these documents, but how you index them. The primary impediment to achieving fast throughput in digitizing documents is the labor required to index them. If a

document takes 30 seconds to manually index but only takes 0.5 seconds to capture, your problem is labor, not the scanner.

This can lead to customers underestimating the effort of implementing a document management system. There are multiple ways to index your documents for them to be searchable within your DMS. This is where we see another issue arise. At first, many people think that they need everything in the document to be indexed to get the most out of indexing. That is rarely the case. They are thinking of Optical Character Recognition (OCR), which is the process by which scanned images are electronically "read" to convert them into editable text. However, there are also [many drawbacks to OCR and the efficacy and accuracy of searching your documents.](#) In most cases a document should be indexed using only the most common search terms - and these terms may not appear in the document contents. For example, customer correspondence concerning an order may not mention the order number, but it would be desirable if it were also retrieved when searching using the order number. To ensure that your DMS implementation goes smoothly, you want to research and talk to the appropriate professionals about what is best for your business's documents when it comes to scanners and indexing.

Neglect to Hire the Right Expertise

Implementation of a DMS has its challenges. However, To get the most out of your DMS, you need to hire the right experts. Your in-house experts are great with the systems you currently use and are vital to your day-to-day business. However, outside consultants know how to implement new technologies and help train your in-house experts instead of taking time to have them learn it on their own. We see this issue mainly when people think it is more cost-effective to DIY. That is not the case for most companies. In order to avoid this issue, be sure to talk to the right experts who not only are subject

matter experts but also have the proper training needed for you and your employees.

Next Steps

As you go through your DMS journey, be sure to keep these mistakes in mind and do your research before jumping in. There are many different options out there when choosing a DMS so don't allow these mistakes to get in the way of finding the right one for your business. As always, choosing a trustworthy and reliable document management vendor is a crucial step in the process. Here at mindwrap, we provide you with the support, tools, and robust technology you need to utilize your document management system to its full potential. Question on how to avoid more mistakes? Contact us today, and we'd be happy to help!