



How to Strengthen Client Relationships with a Document Management System

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There are multiple benefits of a document management system (DMS.) Less storage space, better version control, save time, increased collaboration, and more. Good client relationships begin with a robust document management strategy and system. Depending on your business's industry, you could be dealing with direct customers, interacting with businesses, or even a mixture of both.

Either way, there is a lot of information that travels from your business to the clients and businesses you work with. These could be reports, invoices, client information, etc., documents vital to your relationship with your clients. Therefore, having a DMS will open the door for your company to not only maintain your client relationships but strengthen them. In this article, we will talk through three ways a DMS can improve your client relationships.

System Integration

A system is only as good as the tools it provides to integrate with your existing computing environment. A system that can't communicate with your other technologies is useless overall when it comes to communication throughout your business, specifically with your customers. As we all know, no one system can do everything. This is why integration with the best of breed is so important. From a client relationship standpoint, you would want to make sure that your documents are easily accessible in these systems so that you can quickly respond to your clients.

The most critical client information is within documents. For example, your business may have a client relationship management system (CRM) that holds all client deals, contact records, marketing efforts, and more. If your documents are scattered around in different systems or even through other areas of your office, it will take time for your

employees to find them and send them over to your clients. Not being able to get information to your clients promptly could make a significant impact on client relationships.

By having a DMS that can integrate with systems such as a CRM, you can have visibility and access to all your client documents and information in one place. That will allow for seamless communication across not only your different systems but also seamless communication with your clients as well.

Workflows

Workflow automation within a DMS takes productivity to the next level. By standardizing the steps within your business processes for document management, [workflow solutions are crucial](#) and allow you to apply custom rules, and logic that ensures specific actions are taken or conditions are met before a document can proceed to the next step. By having workflows in place within a DMS, you can minimize manual work and allow for timely movement of documents that allow for a quick turnaround for your clients.

For example, your business may have recurring client engagements such as invoices that must go through multiple people before being sent over to the client. Without a workflow, you run into the issue of missing documents, human error, and bottlenecking your process. In addition, you want to assure your clients that documents will get to them on time. Timeliness is an essential part of client relationships if you are late on sending or finding a document that reflects on your business. With DMS workflows, you can streamline outgoing documents and allow for a quick turnaround for incoming documents.

From internal review to your client's hands, workflows within a DMS can transform your client relationships.

Security

Security is important when it comes to your documents, especially client-related documents. The last thing you want as a business is to misplace, lose, or have client-related documents fall into the wrong hands. There are only so many security features that paper files and online document storage systems can do for you. To assure your clients that their documents are safe, you need a system that has the security to protect your clients. Trust is essential when it comes to client relationships. For your clients to trust you, you need to ensure that their personal information, company information, and all documents are secure. With a DMS, you can give your clients that sense of security and relief knowing that their personal information is secure. [DMS has more robust security options](#) depending on your business needs. A DMS not only protects your clients information but also allows for audit trails, managed access, overall physical security, and more to give you complete control of your documents.

Getting Started

Ready to take your client relationship to the next level with a DMS? Great! We can help! Now that you understand the benefits of a DMS when it comes to your client relationships, you are now ready to start the process of implementing a DMS. Here at Mindwrap, we have the technology and team to help your business grow your document management as well as your client relationship. So [contact us](#) today to get more information on how to get started!