

Document Management Checklist

Below is a simple checklist that reflects some of the business problems JHBRM can help you solve, and will help you determine where inefficiency may be hiding in your organization.

Customer Service

External

- Customers are frustrated with how long they have to wait for information.
 - Supplying requested documents to customers is very time consuming and costly.
 - Customer service reps have increasing difficulty managing papers and files on their desks.
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Internal

- We do not have a comprehensive document retention and destruction policy.
 - Our attorneys have expressed concern related to our document retention procedures or lack thereof.
 - Employees spend a great deal of their time retrieving and filing documents.
 - Employees are confined to cramped workspaces, while file cabinets and banker boxes consume increasingly more and more floor space.
 - We have no disaster recovery plan for paper documents.
 - We have no disaster recovery plan for data.
 - Employees continually find ways to sidestep company business policies and procedures.
 - We experience inaccuracies and errors that occur due to searching through large reports or files for information.
 - We have lost business or lost potential customers because of lost or misplaced documents that have "slipped through the cracks."
 - Our dependency on paper files results in needless duplication, increasing our cost and creating disorder.
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Efficiency

- We waste valuable man hours faxing and re-faxing documents.

- Our billing is requiring more time as our existing customer base expands.

- The paper process has a number of inefficiencies that prevent growth and force us to add staff and infrastructure.

- Office documents such as Word or Excel and even emails are becoming increasingly difficult to organize.

- Turnover is increasing due to an imbalance of workload.

- We are continually challenged with the need to share information from department to department.

- Losing or misplacing files has cost us time and money.

- Monitoring the workload of employees is difficult and requires an inappropriate amount of time from managers.

- The amount of paper we generate by copying and printing information for internal use is frustrating, yet it continues to increase.

Security

- We are currently unable to monitor access to sensitive documents, or are unable to monitor access to the degree required by industry standards.

- Employee theft of customer and account information has caused irrecoverable damage to my company.

- We are finding an increased need for remote access of mission-critical documentation.

- It's becoming increasingly difficult to control who accesses critical documents, and when.

- I continually see duplicate copies of seemingly controlled or proprietary documents accessible on employees' desks.