*File***Bound**

Content Management Solutions

Workflow - Managing Change
By Jon Eilers

About the Author: Jon Eilers

CDIA+, 12 years experience in the records management industry; including sales, business process management, software implementation and training. Formerly acted as Partner and COO at Sharpen BPI, a document and content management solutions provider. Currently Vice President of Sales

"Some of America's finest companies have trusted FileBound for their records management needs"

"Image your critical corporate information, accessible from anywhere in the world and always up-tp-date. Start using the power of the Internet to drive your document repository!"

After spending time in the past selling and implementing a large number of workflow sales, I've come to realize from experience, to be successful you better have a comprehensive strategy in place. This includes a well prepared presentation that demonstrates how workflow can help operational level workers do their jobs more efficiently. This will allow you to win their total buy in. You also want to make sure you've got senior management buy in on the proposed project as well.

Workflow can result in some very significant results for any organization who WANTS to improve and change how they do business today. That 'WANT' requires total buy in from senior management. I've found that without either a C level sponsor or some other member of senior management taking an active role in the TOTAL implementation process, you run the risk of political isolation or worse yet sabotage. It may be difficult to get this type of participation due to their level of responsibilities within the organization, but the time you put in to get that participation will pay off with a successful and loyal client.

The first step in a successful workflow implementation is the creation of a Scope of Work document based on the findings of your discovery process. Outlining and creating a specific Scope of Work document for everyone involved at the organization will help set realistic expectations on both sides. That document should include objectives to accomplish, participation requirements, time frames, project phases, and deadlines. By working together with the C level sponsor or senior management to create this document you immediately bring them into the process with the requirements you can both agree upon.

It's also very important to understand that people by nature are adverse to change. It doesn't take long for the department level managers on down to discover that the workflow solution will change how they perform their daily work and tasks. It also doesn't take long for the same people to understand that all the talk in their office about increased efficiencies, automated decision making, measurable efficiency reporting, deadline enforcement, and audit trails could mean the worse case scenario for them, accountability.

FileBound is a web-based content management solution that can be accessed as an ASP service or licensed to run on your internal infrastructure. FileBound allows you to create, store, distribute, and manage all of your informational assets. This is accomplished by engaging the FileBound components which include: document imaging, eforms, workflow and our integration toolkit.

"FileBound provides the tools to empower your organization to leverage information in order to achieve your potential."

Without laying the groundwork and getting the senior level participation in the process, you could run up against a wide variety of obstacles from the department level managers on down who both fear and don't understand the changes you're bringing to their happy world. Obstacles that in the long run can make your implementation very difficult and stretch out previously set goals, create cost overruns, and make the people at the top very unhappy.

Knowing and understanding these issues on the front end, being able to effectively manage the change your workflow solution is going to bring an organization at all levels, becomes crucial.

Workflow (If properly planned) by nature will bring important benefits to the organization such as:

» Making decisions in an automated fashion

» Ensuring that timelines and deadlines are met

» Providing a complete audit and reporting trail of all work in progress and completed

» Creating a constant flow of work for employees to maximize their time

» Forcing an organization to clearly articulate their business processes

» Helping business owners or executives to make better informed decisions

» Helping to better balance the load of work to increase efficiencies

I believe we all could add a few more bullet points to that list from our experiences in the field. That short list alone can mean a dramatic increase in productivity, savings, and profits for any organization. Is offering workflow a great opportunity for increased or add-on sales in your organization? Yes. Can a workflow implementation be difficult if not properly managed? Yes.

As with any type of new implementation, being prepared is of the utmost importance. By properly positioning the solution in the sales process, planning the implementation with all levels of the organization, implementing the solution with a well defined plan, and continually managing change, you will end up providing a much higher level of value to your customer, put more money in your pocket, and most importantly develop a long term loyal client.