

# Helping Clients Develop a Document Technology Strategy

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Many document technology resellers have incorporated extensive customer facilities assessments into their sales process with the outcome of identifying selling opportunities for new technology.

Since facility assessments have been around for several years, it is becoming increasingly difficult to build value in them in the customer's eyes. Many customers view the assessment as a unilateral element of the sales process that benefits the seller while not providing a long term value to the customer's organization after the initial sale.

In order to build greater value in the assessment process and create competitive distinction in the marketplace, I suggest that sellers go beyond just the assessment process and initial sale to help clients develop a long term document technology strategy.

Document technology strategy (DTS) is defined as a well planned approach to harnessing existing IT infrastructure with emerging document technology with the outcome of increasing productivity and reducing total cost of ownership.

Here are five steps for creating and implementing an effective DTS.

1. **Collaborate** with internal and external resources
2. **Assess** the current document technology environment
3. **Design** an integrated document technology strategy
4. **Implement** the strategy as an evolution not a revolution
5. **Measure results and manage** the ongoing project

## **1. Collaborate with internal and external resources**

To facilitate internal collaboration a project team should be selected with members representing and drawing from internal resources from IT, finance, facilities/operations and key department managers who design and implement workflow processes. Upper management must be engaged and champion the team from the start and maintain involvement on an ongoing basis.

External resources can provide valuable expertise and in doing so accelerate the development and implementation of the strategy. Many document technology vendors provide teams of expert resources who are highly skilled in the analysis of the current document environment and the development of recommendations.

## 2. Assess the current document technology environment

The next step in the process is to assess the current document technology environment with the outcome of identifying areas of inappropriate asset allocation, workgroups where applications do not match existing technology, opportunities for workflow innovation with MFPs and opportunities to right size the document technology fleet.

In the facilities survey, an inventory of all input and output devices in the current document technology fleet is conducted. Device populations and related monthly volumes should be accumulated by category including printers, copiers, faxes, scanners and MFPs. There are numerous data collection agents available which automate and therefore accelerate this normally time consuming aspect of the site survey. Data collection software captures, compiles and reports each device's location and volume at a minimum for devices connected to the network or workstations.

The facilities site survey also involves an in-depth investigation of each workgroup's business processes, workflow and therefore the document production and distribution logistics. It is here in the tedious, time consuming task of "wandering around" talking to department managers and end-users that areas of dysfunction, waste, redundancy and therefore areas for innovation become obvious.

The facilities assessment should also include a comprehensive operating cost analysis for each device in the fleet. Elements normally included in operating costs are acquisition (lease or depreciation), consumables and maintenance fees.

Beyond operating cost, it is critical to investigate the *related cost* for each device, which combined with operating costs, reflect the true *total cost of ownership*. Related costs include labor expenses relative to human steps required to produce, manage and distribute documents (walking and waiting), fax telephone line and long distance charges, courier fees, office space, help desk support and even power consumption.

Once the assessment is complete and all the information has been gathered it is critical to compile and document the information into a report of the findings. This document contains quantifiable findings including the total fleet population, monthly volumes, operating costs and related costs (TCO). Based on department manager and end-user interviews, workflow process mapping and print tracking reports; the project team can make recommendations for a proposed document technology state.

### **3. Design an integrated document technology strategy**

Based on the information in the assessment report the project team can begin to formulate recommendations for the proposed state of the document technology environment. The information will reveal obvious opportunities for redeploying current devices, reinventing workflow and document production and distribution processes via MFPs, and redirecting print jobs to the most appropriate devices.

By identifying which print devices are under utilized and which are over utilized, decisions can be made as to where to properly deploy each device for optimum utilization and performance. By identifying high volume print devices located in proximity to high volume copiers and faxes, the opportunity to right size the workgroup's fleet with MFPs will be obvious. By identifying which print/copy/fax/scan jobs should be directed to the most application appropriate, efficient and cost effective device; organizations can increase productivity and realize substantial cost savings.

When designing a document technology strategy it is important to look beyond the obvious device centric technology and explore middleware solutions including document management, e-forms and variable data printing applications. By harnessing the document technology device with middleware solutions organizations can automate document production, distribution and management reducing document life cycle labor time and related costs dramatically.

#### **Four: Implement the strategy as an evolution not a revolution**

During the assessment process occurrences of redundancy and waste become painfully obvious. The first step in implementing a DTS is to dispose of obsolete printers which tax help desk, consume power excessively, and require difficult to locate and manage consumables and parts.

After filtering the legacy printer fleet down to the "best of class" devices, the remaining devices should be redeployed in the most application and volume appropriate settings to maximize utilization and ROI.

Next, the analog copiers can be replaced with networked MFPs which allow the consolidation of obsolete stand alone fax machines, fax servers and scanners.

Beyond the obvious, implementing a new DTS and reconfiguring business processes can be challenging. Rational implementation means implementing the new DTS as an evolutionary process versus a revolutionary event.

When introducing middleware solutions, pilot projects can be implemented in smaller more manageable departments at first with the scaling of the implementation enterprise wide implemented in phases. Piloting and phasing implementation over time allows organizations to gradually influence end-user acceptance and address cultural issues related to ushering in change.

### **Five: Measure results and manage the ongoing project**

Managing the ongoing implementation process includes measuring the effectiveness of each phase of implementation. Assessing and documenting productivity increases and cost reductions verify ROI and leads to greater buy-in from finance and department managers with budget responsibility.

Ongoing management also involves quarterly, semi-annual or annual account reviews conducted with the project team and participating vendors. Account review agenda items should include: technology performance, ROI verification, vendor service/support, and suggestions for improvements offered by each side.

### **Conclusion**

The common promise of technology is to increase productivity and reduce costs thus realizing a sound return on investment. By proactively implementing a sound document technology strategy organizations can realize these promised outcomes. By helping customers develop a long term plan for the seamless integration of document technology resellers can position themselves as consultative resources, build greater value in the customer's eyes and create competitive distinction.

(This article is an excerpt from a white paper titled, *Harnessing IT Infrastructure and Emerging Document Technology to Maximize ROI and Productivity* which is available on [powerselling.com](http://powerselling.com))