

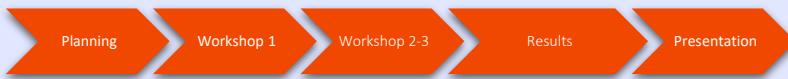
What is your current state and what do you need to consider?

Document management is the process of organizing, storing, searching, retrieving and managing documents within an organization in a secure way.

To be able to take on a project for improvement of your document management you need to know where to start and what to consider.

The goal of the pre-study is to provide you with a documented starting position where you know what to address, which stakeholders that are important to consider and how your business information structure looks when it comes to managing documents.

The pre-study gives you the understanding of the complexity you face and help you plan effectively for the coming project work.



What we do?

Gather your group and meet up with our experienced ECM / Document management experts. We will do a deep dive into your situation and what you want to accomplish.

We will look into your situation using long tested tools to effectively document the outcome:

- Goal model with stakeholders
- Information model
- List of existing document sets
- List of internal and external regulations concerning document management

We'll leave you with a report including the models and lists above to support you in the decision on how to move on.

How we do it?

We take your organization from idea to road map within 2-4 weeks using a 5-step-process:

- 1) Planning:** A short meeting where we set the objectives and guide you in terms of attendees and agenda
- 2) Workshop 1:** Goal model combines goals you want to achieve, identifies problems and which stakeholders to consider
- 3) Workshop 2-3:** Information model and list of existing document sets
- 4) Results:** A report with the results
- 5) Presentation:** We meet for a presentation of the results

What you get?

In short you have conducted a pre-study. That is, both you and we know quite well how complex the situation is and what is needed to be considered.

- **Goals, stakeholders and problems:** This sets much of the scope for the coming project activities. The goal model can be used as a steering tool and index for the project. It connects visionary goals with impact goals, product goals and project goals. Usually, the goals are prioritized together with the stakeholders.
- **Information model:** The information model describes the business information related to the documents. This leads to that the work with creating the structure will be based on the information used in the business. This means that when user looks for a document, he/she can do it using the business common terms which is familiar.
- **List of existing document sets:** The existing sets of documents together with priority and if they are in scope or are well managed in the current situation. This sets the scope in another dimension than the goal model.

Benefits

- You will get a good overview of the current document landscape quickly
- To a limited cost
- A limited time will be spent for your personnel
- Can be used for prioritization of ECM goals and scope definition
- Base for business case
- All kinds of goals, problems and stakeholders are documented, giving you the possibility to plan and think ahead using the right category of internal and external resources
- You get a base for the structure that is needed in the logical design, which would be a natural next step
- You can from this decide which parts you can do yourself in your organization and what you might need external help

Get in contact with us

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