

Doxim Health Check & ECM Strategy Consulting

BACKGROUND

The Doxim Health Check & ECM Strategy Consulting engagement is a pre-packaged professional services offering from Doxim. It's designed to help map out a practical and evolving content management strategy for any organization.

Perhaps you are just thinking about the benefits of leveraging Document Management, or maybe you've already adopted an eStatements solution and you're wondering what your next steps should be. Either way, a Doxim Content Management Health Check will help map out the approach that makes the most sense for your own particular organization's needs, resources and imperatives.

Each Doxim Health Check & ECM Strategy Consulting engagement comprises:

1. Pre-workshop Exploration Phase

During this phase, an initial discovery call will be arranged in order to review the entire process and to discuss any current goals or expectations. The next step will be to complete a comprehensive questionnaire about the existing document management environment to provide insight and understanding needed to properly scope the second phase of the Health Check. During this phase the initial findings will be reviewed to create the agenda and choose the appropriate service package (see chart on page 2.)

2. Doxim ECM Health Check

For those companies that have been using Doxim ECM for some time, a usage assessment will be performed. During this stage, all existing Doxim ECM projects will be reviewed and discussed. Some adjustments or enhancements may be made in real time during the session, while other observations, recommendations, or items for review will be included in the final report. The purpose of this stage is to ensure that the Doxim ECM environment is optimized for existing processes and that the appropriate features and functionality are enabled and properly configured.

3. Onsite Discovery Workshop

A one to three day onsite workshop to thoroughly explore the existing paper-based/document intensive procedures and related business processes. During this phase, existing goals and desired milestones will be reviewed and discussed. Depending on the level of detail required, one-on-one sessions may be arranged with different staff across departments to allow the processes and procedures to be monitored first hand. This will provide the information needed to create a comprehensive set of observations and recommendations for process improvements. For details on the services delivered and to help you choose the most appropriate package, see the detailed service package chart on page 2.

4. Report and Roadmap

Creation and delivery of a detailed report that documents all the observations and recommendations from the onsite workshop along with recommended solutions for process improvements and cost savings will be presented in the form of a comprehensive document management roadmap. The recommendations will be based on the findings from the Health Check along with the organizational goals identified during the session. This will also be augmented with documented best practices based on experiences with many other financial institutions and their use of document management. The final recommendations will be an inventory of identified goals along with commentary on priorities and timelines.

To find out more, please contact your Doxim Account Manager or email us at info@doxim.com.