Tips and Pitfalls of implementing DMS
Agenda

1st Part
- The benefits of DMS to an Organization

2nd Part
- The Pitfalls of Implementing a DMS
- How to Successfully Implement a DMS in your Organization

3rd Part
- Ricoh HK and Product Portfolio for DMS
Introduction

Knowledge in a business

- Experience of the employees
- Designs for the products
- Planning for the activities in an organization
- Documents
Why do we need DMS?

- According to a Gartner Group Research, the cost of document generation and management could account for 3% of the annual revenue.

- The printed paper output in a typical office is growing at 21% per year.
Document and Business Relationship

Sales & Marketing
- Quotation
- Customer Orders
- Sales Order
- Production Order

Operations
- Packaging List
- Production Schedule

Finance
- Credit Control
- Sales reports
- Monthly Reports
- AR reports
- Delivery Note
- Invoices
Why do we need DMS?

The **BENEFITS** of implementing a DMS

- Improvement in goods and services offered
- Improvements in Customer Service
- Improvements in Staff Productivity
- Improvements in Recruitment and Staffing
Q1. Why do I need Document Management System?

Manufacturer and Distributor for Disposable Forks and Knifes

30 minutes!!
Q1. Why do I need Document Management System?

30 minutes!! → 5 minutes!! → Productivity Gain of 600%!!!
Pitfalls in implementing DMS

• If the benefits of a DMS is so great,
  • How come so many organizations are still not using DMS?
  • How come so many DMS projects got kicked off and got stuck in the pilot phase?

• What are the Successful Factors and Pitfalls in implementing DMS?
Pitfalls in implementing DMS

- People Factor
- System Factor
- Supplier Factor

Pitfalls
Pitfalls in implementing DMS

People Factor

Poor planning
• A lot of people do not realize the importance of planning, they don’t have a timeline for the implementation, and the resources required in each phase

Sense of purpose
• Before the implementation, we would need to give a deep thought on the business problems, and try to understand how a DMS could help to solve these problems

Lack of Responsibility
• Knowledge management is likely to die out if no one is taking responsibility
Pitfalls in implementing DMS

Functions do not match the user requirements
• Sometimes, the pitfalls are related to the system itself

Lack of customization
• If the workflow is really complicated, then DMS may need some customizations
No defined Scope from the Supplier
• Sometime, the pitfalls are related to the Vendor implementing the system
• Problems often arise, when the vendor did not have a defined scope, and started off the project too big!

• Ricoh have over 10 years of experience in providing DMS solutions. And our network solution team consists of around 20 people, and they have helped a lot of organizations to reengineer their document workflow and process
• We believe that Ricoh is the rightful supplier for your DMS
A Successful DMS implementation

- Fact Finding
- Formalized Approach
- Implementation
- Evaluation
A Successful DMS implementation

Fact Finding

The fact finding activities should revolve around 5 key areas

- Stakeholders
- Strategy
- Finance
- Resources
A Successful DMS implementation

Fact Finding

Formalized Approach

- Based on the information gathered in the last two sections
- Details on the project management, including resource management, timeline for the infrastructure improvement, disaster recovery
- Expectation Management

Implementation

Evaluation
A Successful DMS implementation

Fact Finding

Formalized Approach

Implementation

- Then the third phase would be implementing the DMS solution
- Selecting the appropriate vendor and negotiate the contract agreements with them
- Choosing a vendor that has the experience in understanding the business problems, user requirements, and the ability to implement an appropriate DMS solution

Evaluation
A Successful DMS implementation

Fact Finding

Formalized Approach

Implementation

Evaluation

Evaluate

- The final stage is to evaluate the progress made on the system
- This is often one of the most neglected stage in an implementation
  - Modify
  - Extend
  - Disable
Company Background
About Ricoh Hong Kong

• Established for 45 years in Hong Kong since 1963

• Hong Kong’s No. 1 sales and support team

• One-stop solution:
  – Office Consulting
  – Products line-up – multi-function printer, laser printer, digital duplicators, other general office products, office supplies
  – Maintenance service
  – Conversion service
  – IT Services – IT products and network services
Company Background
The Ricoh Global Network

• Headquartered in Japan and has offices around the world in USA, South America, Europe & Asia Pacific

• Major product lines:
  – Multi-function printers (MFP)
  – Laser printers
  – Fax machines
  – Digital duplicators
  – Related supplies and services
  – Digital cameras and advanced electronic devices
Our Solutions

Capture

Manage

Store

Deliver
Live Demonstration in our Booth

Document Management System- Square

Workflow Solution- EasyFlow, SBA
Appendix
A Successful DMS implementation

Data Collection

- Observing the internal process
- Everyone in business creates, archives, share, copy, modify and dispose information
- What is missing is just a formalized approach to handle these bits and pieces
Introduction

The Buzz Words for Knowledge Management

- Document Management
- Document Imaging
- Records Management
- Content Management
- Enterprise Content Management
- e filing

- Knowledge Collaboration
What constitutes a complete DMS? (use the slide from the canned powerpoint) ....

1. Capture
2. Manage
3. Distribute
4. WorkFlow
5. Integration/
6. Database
7. Storage
Why do we need DMS?

Problems facing most organizations

• Increased turnover rate
• Complicated/ Project based workflow
• Traditional structural source of advantage eroding
• Fast pace of changes in the marketplace
Introduction

What does that mean?

- Creating repositories of information about best practices
- Setting up networks for transferring information
- Creating procedures to ensure that lessons learnt are passed along