

# Going digital

## How an ECM system can save time and money, and limit errors

INTERVIEWED BY SUE OSTROWSKI

With significant disruptions to business during the pandemic and employees suddenly forced to work remotely, companies are scrambling to manage their data — some of which is still on paper at the office along with vital information in separate sources such as emails, ERPs, file shares and faxes.

“Previously, employees spent hours a week tracking down paper documents,” says Lora Holman, advanced solutions sales executive for ECM at Blue Technologies. “With remote work and no physical access to documents, companies are implementing Enterprise Content Management systems to access every document in one location digitally.”

*Smart Business* spoke with Holman about how integrating an ECM system into your business can save time and money, limit data entry errors and free employees to focus on more critical tasks.

### WHAT IS ENTERPRISE CONTENT MANAGEMENT?

ECM is the key to digital transformation, moving an organization’s vital information into a central repository, establishing one source of truth. When information is on paper and in cabinets, it wastes time when people get up, search for documents and pass them along. Then those documents can get misfiled, costing time and money. With the pandemic, and people working remotely, it isn’t practical to access paper documents.

ECM automatically scans documents into electronic filing cabinets, indexing the information with key words to create a flexible and powerful searching tool whenever information needs to be located fast. It stores the information in its native format while providing tools for annotating, versions and e-signatures, all while keeping

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a detailed history and audit trail for compliance and data security.

### WHAT IS THE FIRST STEP TOWARD IMPLEMENTING ECM?

Think about employees and where they spend the most administrative time. An adviser can help you consider how to minimize labor efforts to run more productively and profitably and help determine how digital transformation can help your business. What you don’t want to do is eat the elephant all in one bite. Figure out where you are going to see the first return on your investment. Make it practical and break it down, so it’s doable.

### HOW CAN ECM IMPROVE A BUSINESS’S ACCOUNTING PROCESSES?

When a business receives goods delivered from a vendor, accounting must verify from several documents that the item, quantity and purchase order match up to pay the vendor invoice. This takes up employee time finding all relevant documents, printing to compare and verify the match, then re-entering data into the ERP business system.

ECM allows you to access documents in one central place in a virtual filing cabinet. This can save a tremendous amount of time and free up accounts payable and receivable employees for tasks such as determining if they can take advantage of

early pay discounts with suppliers that can improve profitability. In addition, entering documents manually can create errors that are difficult to catch until they are further downstream. With disruptions in staffing due to the pandemic, there are fewer people that need to do more with less. Because there is still the same volume of documents, ECM is more critical than ever.

### WHAT ARE OTHER ADVANTAGES?

Because the system pulls data together, organized in one central repository, it empowers employees to search across a whole volume of documents.

It can also help you identify your most prominent areas of lost productivity, which provides greater owner control. If you can’t see across all your data points, it’s hard to manage them. Most owners will start in one area of the company. Because ECM is scalable, you don’t have to buy a new solution and can apply that budget to other areas of the business.

### IS ECM SECURE?

It takes data protection to a whole new level. You can lock down permissions, and it’s more secure than emails and file sharing. Step back and think about your data and where people are spending their time. ECM can help you get some of that back, improve efficiencies, and gain better visibility to manage your business. ●