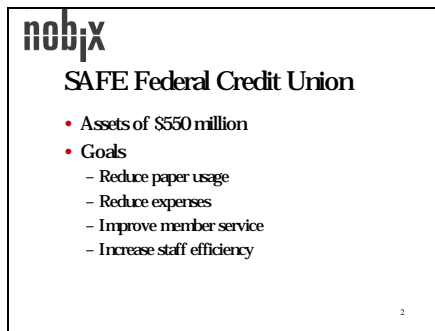


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Document Management: 10 Steps to Success
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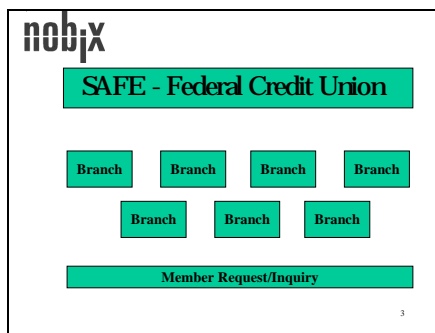
Slide 1



Slide 2



Slide 3



Slide 4

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Step 1 - Identify inefficiencies

External - responding to members

- Retrieval from microfiche
- Print at home office - fax to branch
- Branch offices wait days for data

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Step 1 - Identify inefficiencies

Internal

- Large volume printing
- Timely distribution of financial reports
- Off-site storage

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Step 2 - Cost Analysis

- Cost of microfiche
- Cost to print on paper
- Cost to mail, fax or courier
- Cost of labor
- Cost of storage

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Cost of Microfiche

- \$ 20,000 - \$ 25,000 per year
- Includes cost to create microfiche
- Does not include retrieval costs
- Does not include maintenance costs
- Does not include storage costs

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Cost of Reports on Paper

- \$ 15,000 - \$ 20,000 per year
- Does not include printing costs
- Does not include labor cost for printing
- Does not include labor cost for distribution
- Does not include storage costs in vaults and warehouses

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Step 3 - Identify Solutions

- Robust COLD product
- On-line viewing
- Storage & retrieval
- Distributed throughout organization
- Client/Service
- Imaging

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Step 4 - Establish a budget

- Establish total cost of solution
- Address current costs which will be reduced
- Develop return on investment schedule

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Step 5 - Consider future needs


- Electronic forms
- Compatibility of other applications
- ATM compatibility
- Other vendor applications
- Storage compatibility

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Step 6 - Research



- Is there an industry standard?
- Which solution best addresses your needs?
- Cost-performance analysis per solution
- Talk to customers with similar solutions
- See a product demo

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Step 7 - Partnership




- Communicate your short & long term business needs to the solution provider.
- Negotiate an implementation schedule which addresses these business needs.

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Step 8 - Selling



- Communicate internally
- What are the rewards?
- Share the implementation schedule
- Publish cost savings & ROI

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Step 9 - Installation


- Weigh the pros and cons of internal versus vendor installation.
- Identify risks of internal installation
 - loss of support staff
 - longer implementation schedule
- SAFE chose to self-install.
- In retrospect, would have chosen the experts

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Step 10 - Training



- Wait until application is on-line
- Value Training
- Prepare
- Allow sufficient time
- No other responsibilities during training

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Success !



- Eliminated microfiche
- Reduced Printing costs by 75 %
- Improved member service by 60 %

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