

Simplicity key to information management success

By Greg Lock, ECM Solutions Architect, Itec

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Information management is a crucial part of business today, as companies struggle to make sense of the copious amounts of data that flow through the organisations. In addition to that, the battle for continuous improvements in efficiencies remains a key priority.

According to the InformationWeek 2014 Analytics, Business Intelligence and Information Management Survey, while **advanced analytics** capabilities remain in high demand, companies are looking to reduce complexity. This is evident in the demand for **data visualisation** and the desire for easier-to-use **software** and self-service. Greg Lock, the ECM solutions architect at Itec, agrees.

"Workflow processing goes beyond just document workflows. It is also based on processing workflow such as new deals, new clients and new suppliers – effectively, the process that most companies need to follow to get these processes completed," says Lock.

"What we are doing is taking the manual processes a client has in place, seeing how they physically handle those processes and how long it takes, and then we design the most efficient processes for them." He adds that most clients are unable to measure existing manual processes, which means they are unable to make calculated decisions on how to improve those.

"We work closely with our clients to determine their needs and challenges to design a workflow that works for them," he says. One example is that of **supplier workflow management**. "Once an invoice is received, it generally needs to be approved by a manager before payment is made," says Lock.

"However, there are a number of challenges that can crop up, such as documents going missing or the manager not being available to sign off on the payment on time, and that has further repercussions." These could include non-payment, being put on back order, or the account even being closed in certain circumstances. "With the right workflow processes in place, everything is automated, allowing for a smooth flow from one department to the next, and even for mobile approvals should the manager not be in the office at the time."

A management overview dashboard then allows the company leadership team to check the status of all workflow processes. They can then see which part of the process is taking the longest, where inefficiencies are and focus on improving that.

"We have definitely seen an increase in uptake for this solution," says Lock. "With today's harsh economic environment, companies need to be more agile to allow them to grow, and by putting the right management information system in place, they are able to do just that." It allows companies to reduce the time they spend on administration and following up on processes, and a quicker turnaround time ultimately allows them to generate more business.

"The key to successful workflow management is, however, to keep it as simple as possible," says Lock. "Implementation should be broken down into phases, with constant change management and training taking place to allow for smooth adoption." He adds that starting small and training each individual on what they need to know is crucial. "Finally, make sure the software is easy to use and that it can be adapted to meet your specific requirements," Lock concludes.

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