



Organizational Strategy Assessment

Do you have inefficient business processes? Is your organization a good candidate for an Electronic Content Management solution? Take the following Organizational Strategy Assessment and find out. At the end of the assessment, you will find instructions on how to evaluate your answers. This worksheet covers Accounting, Sales Order Processing, Human Resources and Distribution and Customer Support.

Accounting Department

1. How long does it take to process invoices?
2. In your opinion, is the time you stated in question 1: () an adequate amount () takes too long
3. How much time is being spent on data entry activities and filing paper invoices?
4. In your opinion, is the time you stated in question 3: () an adequate amount () takes too long
5. Do you ever lose paper copies of invoices? What is the consequence when that happens?
6. Does your company policy require you to match invoices, purchase requests and proof of delivery documents before posting payment? () Yes () No
7. Is that process (please check all that apply): () inefficient () slow () quick () automated
8. Do you currently image/scan any of your invoices? () Yes () No

Sales Order Processing

1. How long does it take to process sales orders?
2. In your opinion, is the time you stated in question 1: () an adequate amount () takes too long
3. Are orders usually accurate the first time around? () Yes () No
4. Have customers ever complained about the time it takes to fill sales orders? () Yes () No
5. Are you required to verify sales orders against previously generated paper-based account information, like maintenance agreements, work orders or quotes? () Yes () No
6. Are you currently allocating office space-or paying for storage space-for storing paper copies of customer information? () Yes () No
7. Do you have a distributed sales force?: () Yes () No
8. In the past year, have you encountered many errors or audit issues because of incorrect sales orders? () Yes () No
9. Does a supervisor have to approve sales orders before they are processed? () Yes () No
10. If you answered "Yes" on question 9, what is your opinion about the length of time it takes to approve payment?

Human Resources

1. Do you have a distributed workforce who needs access to employee records across the country or world? () Yes () No
2. Have you ever lost employee records? () Yes () No
3. Have you encountered compliance issues related to HR documents? () Yes () No
4. Are you having to ship HR documents using USPS or a couries service, like FedEx or UPS, between offices? () Yes () No
5. How long does it take to process a new employee?
6. In your opinion, is the time you stated in question 5: () an adequate amount () takes too long
7. Is pursuing process innovation part of your organizational culture? () Yes () No

Distribution and Customer Support

1. Have you encountered collection issues when a customer claims they have not received delivery and you can't find documentation to prove otherwise? () Yes () No
2. Do you send orders to a warehouse or distribution center for fulfillment? () Yes () No
3. If you answered "Yes" for question 2, how long does it add to the fulfillment process time to do so?
4. In your opinion, is the time you stated in questions 3: () an adequate amount () takes too long
5. Does a manager or supervisor have to verify or approve orders before they go out? () Yes () No
6. In you answered "Yes" for question 5, what is your opinion about the length of time it takes to approve or verify orders?

NEXT STEPS

If you answered "takes too long" for more than one of the opinion questions, then chances are that implementing an ECM solution will benefit your organization.

iSynergy is a comprehensive ECM and workflow automation system. With iSynergy, users can expect to be fully operational in as little as 3 weeks, have information integrated throughout the organization without spending any additional funds for customization and integration programming, and implement technology that dynamically drives the business.

Contact iDatix for a follow up Solution Consultation today! Return your OSA worksheet to us via fax (727)444-4419 or via email sales@idatix.com.