



VirtualCabinet

THE ESSENTIAL

# DOCUMENT MANAGEMENT SYSTEM CHEAT SHEET

**Your 5 Minute Crash Course.**

Organise Your Office. Engage Your Customers.

Get More From Your Existing Team.



# Cheat Sheet: What **Problems** do Document Management Systems Solve?



## Information chaos

Stop duplicate files, content disorganisation, and data overload.



## Email complexity

Control security risks, track files, receive alerts, automatically file attachments.



## Misfiling & search

Prevent significant search time per worker per day looking for lost files.



## Poor security

View audit trails, reduce risk of confidential leaks and hacks.



## Compliance costs

Meet audit and litigation requirements to prevent fines and damages.



## Legal approvals

Legal digital signatures to significantly reduce contract turnaround time.



## Version control

One version of the document seen by everyone, no duplicates and confusion.



## Document access

Log into your document system from outside the office.



## Information silos

Integrates with your existing software and systems so all your files live in one place.

# Cheat Sheet: What Are The Key Business **Adoption Drivers?**



## ROI

ECM (Document Management) applications return \$6.12 per \$1 invested.

- Nucleus Research, 2012

42% of companies achieve a payback period of 12 months or less on their scanning & capture investments.

- AIIM, 2012



## Information Chaos

Staff usually email 2 files a day to 5 people, creating 10 files in multiple places.

- Harmon, 2011

39% of businesses describe their email management as 'chaotic'. 55% call email ungoverned, high risk content.

- Aberdeen Group, 2012



## Productivity & Efficiency

Conducting search across all content could improve staff productivity 30%.

- AIIM, 2011

Businesses using digital signatures save \$20 on average per file, with an 80% reduction in client turnaround times.

- Ombud, 2013



## Security & Lost Data

Companies typically lose up to 20% of their records each year via misfiling.

- ARMA International, 2011

For 60% of large businesses, the impact of leaking confidential info would be high. For 13%, disastrous.

- AIIM, 2012



## Compliance

Audit, litigation, fines and damage costs can be reduced by up to 27%

- AIIM, 2011

Compliance is listed as a top business driver in 90% of projects.

- IDC, 2008



## Storage

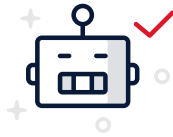
Paper file volume & unstructured data is growing at 30% per year in companies.

- Aberdeen Group, 2012

Businesses could reduce disk space by up to 42% with just 1 copy of each file.

- AIIM, 2011

# Cheat Sheet: What **Benefits** Do Document Management Systems Deliver?



## **Automate Filing**

Automatically file the information you send and receive.



## **Accept Online Signatures**

All your files signed faster online with legally binding signatures.



## **Upgrade Your Email**

Integrate with Outlook, track sent files, increase security, auto-file.



## **Workflows & Compliance**

Streamline office approvals, meet legal & industry requirements.



## **Client Communication**

Communicate via your own branded Client Portal packed with tools.



## **Company-wide File Search**

Get the full history of any customer in seconds & search inside files.



## **Bank-Level Security**

Audit trails, bank-level security & reduce risk of confidential leaks.



## **Powerful Integrations**

Integrate with Word, Excel, Outlook, PowerPoint, CRM & Accounting Apps.



## **Business Reporting**

Insights into your business, team and client performance & workflows.

# Cheat Sheet: What Factors To Consider When Choosing A Systems **Provider?**

- ✓ Find a Document Management technology best-of-breed specialist, not a multi-system vendor.
- ✓ Look at the size of the team, their expertise and commitment to support.
- ✓ Ensure that it meets industry best-practice security requirements.
- ✓ Make sure the system can integrate with your existing business processes and software.
- ✓ Look for a provider that has a proven track record of successful system implementations.
- ✓ Make sure that your chosen provider has a clear data migration plan.
- ✓ Check whether the provider will manage the migration from start to finish.
- ✓ Make sure the system has additional Client Portal communication benefits.
- ✓ Make sure your provider offers local support.
- ✓ Ask for reference sites you can contact to see what other businesses say about the system.

# Cheat Sheet: What **Features** To Look For

- ✓ Global system-wide 'Google' search functionality with enough sorting and filter criteria.
- ✓ OCR (Optical Character Recognition Technology) to allow in-file text searching of scans & PDF's.
- ✓ Automated email and attachment filing, with tracking and capture features to auto-file to the correct customer, job or matter.
- ✓ Seamless integration with your Practice Management, Accounting, CRM, Microsoft Office Suite... and any other software you use.
- ✓ Workflow automation and document life-cycle functionality.
- ✓ In-tray's and document distribution for individual and group file storage and exchange pre-filing.
- ✓ Thumbnail image previews of internal document content in searches.
- ✓ Client Portal communication tools, for secure file sharing and collaboration.
- ✓ Electronic signatures for legally binding digital approvals.
- ✓ Reporting tools to understand your business' performance. For example: total outstanding jobs, or the stage of each document in its workflow.
- ✓ Multiple signatory authorisation on a single document.
- ✓ Strong Document Indexing & Tagging functionality for painless, efficient, accurate filing and retrieval.
- ✓ Automatic email reminders to customers for unsigned or unopened documents.
- ✓ Highly encrypted data with Extended Validation SSL certification & AES-256 file encryption.
- ✓ Audit trails and traceability.
- ✓ Anytime, anywhere, access to documents.

# Cheat Sheet: For A Trouble-Free **Migration**

- ✓ Find a senior-level champion to get involved from the final selection through to implementation, so they can monitor progress through key milestones.
- ✓ Involve the eventual users in your procurement process.
- ✓ Communicate with the team on the selection process and encourage input.
- ✓ Involve IT resources early.
- ✓ Consider software specifications and system requirements.
- ✓ Think about filing structures. How will you want to find client information?
- ✓ Security: consider who will need to have access to those client files and devise access controls.
- ✓ While it's good to think about security up front, don't put too many controls in place unless you really need them.
- ✓ Scanning processes: consider your scanning options for processing incoming documents.
- ✓ Make sure your team is as excited as you are with the new system. Buy-in is critical. As is training.
- ✓ Check that your chosen system adheres to International Standard, ISO/TR 22957:2009. It is recognised as EDM (Electronic Document Management) industry best practice.

So why Choose Virtual Cabinet's Document Management System?

# Organise Your Business, Communicate Faster With Clients, Boost Your Security, Increase Your Existing Team's Performance



## Integrate with your existing software

Seamlessly integrates with all your core applications, including your Email, CRM and Practice Management systems.



## Efficient document workflows

Control the flow of documents and approvals around your office to minimise circulation time and wasteful administration.



## Legally binding online signatures

Get documents signed and returned in minutes instead of days. Better for your business, and much more convenient for your customers.



## Automatically file documents

Email attachments are automatically filed by customer, and linked to your central database for easy future reference.



## Client Portal is better than email

Send large files to your clients without worrying about filling up their inboxes. Real-time file tracking. Significantly increase your security.



## Audited ownership, and security

Full end-to-end audit visibility. Also with bank level encryption and password control. Your data has never been safer.



"Easy to use,  
unmatched features."

Tanya Whidborne, Pitcher Partners



"We cannot now imagine  
being without it."

Tracey Hammond, Moore Stephens



# Trusted By 39,000+ Other Businesses Big & Small



★★★★★  
**Steven Scarlett**  
Partner

"One partner said to me the other day that Virtual Cabinet has changed his life."

**Lovewell Blake**

Leading accountancy firm of 240 staff



★★★★★  
**Tanya Whidborne**  
COO

"Easy to use, unmatched features."



National network of accounting firms



★★★★★  
**Paul Miller**  
Managing Director

"Has been an integral part of our transformation."



Xero Gold Partner technology pioneer



★★★★★  
**Peter Syddall**  
Partner

"It was easy to use, ticked all the boxes and was offered at a great price point suitable for us."



Established Chartered Accountants



★★★★★  
**Robert Dellow**  
Partner

"We cannot imagine life without Virtual Cabinet. It would be a backwards step."



Legal firm dealing with variety of work



★★★★★  
**Darren Kelly**  
Director

"I believe Virtual Cabinet has paid for itself in increased productivity within the first 12 months."



Highly Respected Broker Firm

Read All Our Customer Stories at [VirtualCabinet.com](https://VirtualCabinet.com)



VirtualCabinet

# So What's Next?

Organise Your Office. Engage Your Customers.

Get More From Your Existing Team.

**With Virtual Cabinet.**

[Book A One-On-One Demo >](#)

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