

Selecting a Process and Document Management Vendor

Key Factors and Considerations



Table of Contents

1	Executive Summary.....	3
2	Company Leadership, Experience, Longevity, and Financial Stability.....	4
3	Proven Customer Success and High Retention Rates.....	5
4	Industry Best Practices and Application Expertise.....	6
5	Global 24x7 Support and Wide Geographic Presence.....	7
6	Product Innovation and Market Leadership.....	8
7	Support All Types of Processes.....	9
8	Address All Types of Documents into Your Processes.....	10
9	Development Tools to Address All Process Participants Application Needs.....	11
10	Conclusion.....	12



1 Executive Summary

You've completed your preliminary research and built the business case for your process and document management platform. Now how do you select a vendor?

Today's market is extremely complex and every vendor promises to provide "the best and most comprehensive" solution. The reality is most solutions are either overly complex and take too long and cost too much to implement, or look really nice but are too limited to meet your actual needs.

Despite this daunting challenge it is critical for your company to properly evaluate both vendors and their solutions. Considering most purchases and implementations run in the hundreds of thousands of dollars, choosing the wrong Process and Document Management vendor can be a very costly mistake.

Conversely, selecting the right solution – with the right partner – can drive immediate value for your organization, give you a competitive advantage, and improve business performance. Your investment with the right company and solution will continue to drive ROI as you further connect documents, people, and processes end-to-end across your organization and gain visibility into your business.

Based on our 20+ years experience and customer feedback, we have identified a few key business and technical factors that can help guide you through the vendor selection process. By applying these Key Factors and Considerations to potential vendors and their solutions you will be able to select the right Process and Document Management solution for your organization and business processes. These factors include:

- » Company leadership, experience, longevity, and financial stability
- » Proven customer success and high retention rates
- » Industry best practices and application expertise
- » Global 24x7 support and wide geographic presence
- » Product innovation and market leadership
- » Support of all types of processes
- » Ability to address all types of documents with your processes
- » User capabilities that address all process participants' application needs

These Key Factors and Considerations outline both business and technical factors to consider during the evaluation process. To further assist with your selection process, Global 360 has also provided a comprehensive list of RFP questions available at <http://www.global360.com/resource-center/creating-rfp>.

Both of these documents, together, can serve as a foundation on which to build your selection criteria, selection process, and ultimately to serve to validate your final solution selection for your organization and your unique business processes.



2 Company Leadership, Experience, Longevity, and Financial Stability

Key to any successful business procurement is the financial stability and industry strength of the vendor. Stability and continuity depend on steady growth in sales, customers and R&D spending. You want to ensure that your selected Process and Document Management partner has longevity within the industry and the necessary resources to grow and enhance their solution.

The vendor should have the resources necessary to deliver major product changes, provide ongoing support to their installed base, and adequately support any new customers. These resources include an experienced and knowledgeable workforce.

It is also important to consider industry recognition and awards, including reviews received from independent BPM market analysts, such as Gartner Group and Forrester Research.

Look For:

- » Industry longevity
- » Financial stability
- » Consistent investment in research and development
- » Tried and proven solutions and services
- » Retention of experienced workforce
- » Market leadership as indicated by independent industry analysts



3 Proven Customer Success and High Retention Rates

What customers have to say about their Process and Document Management vendor is a strong indicator of that vendor's strengths and weaknesses. Reputation can make or break a BPM vendor and having strong customer references is a sure sign of a successful Process and Document Management solution and is definitely one thing to consider during your evaluation.

The vendor's customer references should reflect a consistent quality of products and services provided throughout the entire project life, from initial project implementation to ongoing maintenance support. Look for tangible indicators of customer success, such as savings achieved, time efficiencies gained, volume increase, resource decrease, etc.

A successful Process and Document Management vendor should serve as a partner to their customers, rather than a supplier. They should provide opportunities for customers to meet with other solution users in the same industry to share best practices and lessons learned. They should also offer periodic, informational updates on software and services to ensure that customers maintain current on all happenings regarding their solution and solution vendor.

Look For:

- » Tangible customer success
- » Customer satisfaction and retention
- » Customer focus and commitment
- » User groups and committees
- » Informational newsletters on products and services



4 Industry Best Practices and Application Expertise

Applying experience and best practices are keys to achieving success and only an experienced Process and Document Management vendor who is active in the BPM industry can possess the knowledge gained to provide such best practices. The vendor should offer solution frameworks that bring together industry best practices and proven process improvement solutions to accelerate your time to results in critical business areas. It is important that best practices be applied to all aspects of the project from requirements gathering and solution design through to training and actual solution implementation.

In addition to knowledge of best practices, a successful Process and Document Management vendor possesses the industry expertise needed to provide a solution to meet the document and process management needs that are unique to your industry, whether that is finance, insurance, government, or commercial. Application expertise is also an important factor when providing solutions in specific areas of an industry such as claims processing, accounts payable/receivable, application processing, etc.

The vendor's vertical market and application expertise should be built into the software via knowledge gained by implementing and adapting the software solution to meet the needs of specific industries and applications. A vendor who provides both vertical market and application-specific solutions facilitates usability by using language and workflows already well understood by the target users, thus reducing implementation time and cost.

Look For:

- » Industry-specific process knowledge and experience-based best practices
- » Cross industry expertise (i.e. Government, finance, insurance, commercial)
- » Cross application expertise (i.e. Accounts payable, claims processing, customer service)
- » Process frameworks based on specific industry best practices



5 Global 24x7 Support and Wide Geographic Presence

You have invested in a Process and Document Management solution; it has been successfully deployed and is in production. Now is the time you realize just how critical the ongoing software support service is to the success of your investment. You do not want a vendor who will just walk away once your system is live.

No matter which vendor and solution you choose, you will need software support throughout the life of the project to ensure you maintain efficient, reliable, mission-critical systems while helping your staff acquire new software maintenance skills. This support should include provision of product enhancements/service packs/patches, system upgrades, routine maintenance, and training.

It is especially important that support personnel be available from a wide array of geographical locations to ensure that you receive the support you need, wherever and whenever you need it. A successful support organization will maximize operational efficiency and system availability, optimize performance and ensure overall solution success.

Look For:

- » Round-the-clock, personalized, and online service, support and maintenance
- » Team-to-named-customer support approach
- » Predictable and proactive customer care
- » Support experts available by phone, email and web for issue reporting and resolution
- » Response and escalation guidelines



6 Product Innovation and Market Leadership

Consistent product growth and innovation reflects the commitment of the Process and Document Management vendor to both the industry and customers. You want a vendor who will consider your enhancement requests in a timely manner; a vendor who knows your organization and its specific Process and Document Management requirements; a vendor who is willing to commit the resources necessary to enhance the solution appropriately. In addition, the vendor should possess and leverage strong relationships with industry analysts and technology partners for unbiased review and input and to ensure that their product road map is technically sound.

Look for a vendor that has a vision for its solution and a plan to realize that vision. A clear and precise corporate strategy from a Process and Document Management vendor who is able and willing to commit time and money in research to determine current market trends and industry requirements, will ensure solution leadership.

Look For:

- » Commitment to technology growth and product innovation
- » Consistent record of product growth
- » Market leadership as indicated by independent industry analysts
- » Involvement with, and membership in, industry organizations



7 Support For All Types of Processes

You have reviewed the business capabilities of the Process and Document Management vendor and determined that the vendor possesses the necessary business resources (financial, industry expertise and experience, global support services, etc.) to serve as your BPM partner. It is now time to look at the technical capabilities of the solution itself.

Automation of work into electronic processes, along with the agility of those processes, is key to any Process and Document Management Solution. Of equal importance is the flexibility and agility provided to the user of the process, enabling their view of processes that are strictly within their scope of work.

The Process and Document Management Solution should include process modeling and execution capabilities to support your organization throughout the entire deployment cycle, from initial process modeling and design through process execution and continuous improvement. The solution should manage integrated process execution and states of all types of processes, from straight-through transactions to long-running, unstructured processes that exist in your organization.

Look For:

- » Flexibility to incorporate multiple types of processes (straight-thru, ad-hoc, case-based) as well as multiple types of “paper” (even sticky notes) as full participants in the process
- » Synchronous workflow
- » Collaboration — collaborate on the fly with any other user or group of users — any collaboration, as well as any documents associated with it, are all captured and stored as a part of that work item
- » Advanced simulation capabilities — create multiple scenarios – based on both historical and real-time information leveraged from a variety of platforms
- » Support of adaptive workflows — rules for exception management
- » Ability to easily link unstructured information into a new or existing structured process



8 Address All Types of Documents into Your Processes

There are numerous challenges that go along with the ever-expanding volume of paper and electronic content being generated by today's businesses. Your company has all types of critical documents and content, in all types of formats, critical to your business, so it is of utmost importance that your chosen Process and Document Management Solution supports all types of formats and integration - from microfiche and all types of scanners to Adobe PDFs, images, and electronic documents.

Since paper and document-intensive processes can be time-consuming, costly and most important, impact your bottom-line, the solution should integrate enterprise content directly into the way you do business and support the entire document lifecycle from initial creation and scanning through collaboration and secure deletion

Look For:

- » Ability to handle virtually any content type and define the unique behaviors of different content types in your organization without requiring custom development
- » Aggregation of all necessary data, document, files, tasks or other critical information into a single virtual folder making it easier for users to collect all relevant documents related to the 'case'
- » Integration of the virtual folder into any defined or ad hoc process
- » Automatic assembly of process maps and associated documentation
- » Document access regardless of location or archive - in a seamless, single view of all case information
- » Leverage of existing systems and data including SOA, ESBs, XML, web services, enhanced messaging, and metadata storage



9 Development Tools to Address All Process Participants Application Needs

Until recently the BPM industry has been mainly focused on the work process design and flow, with little attention actually paid to the user experience. User interfaces have historically been difficult to use and often require much coding and customization, severely limiting the effectiveness and efficiency of participants in a work process.

Your Process and Document Management Solution should provide the same level of flexibility and agility to the user that it does to the process. Key to accelerated, low cost deployment is easily created and modifiable user interfaces. A process and document management solution should have an intuitive, configurable, and personable user experience to accelerate time-to-deployment and reduce costs associated with complex user applications.

Look for a user interface that focuses on the end user of the process, not just the process builder. The user interface should focus on the specific needs of each user that interfaces with the process and provide that user with a single application that is tailored to their unique requirements.

Look For:

- » Intuitive and configurable user environments
- » An interface that can be personalized by the end user to suit the task at hand
- » User applications that are pre-packaged for specific industries and business processes
- » Drag-and-drop user-experience design
- » Drag-and-drop process building and application design tools with pre-configured components and process tasks



10 Conclusion

Selecting a Process and Document Management vendor will be one of the most critical decisions your company faces. It can be an extremely lengthy and even costly endeavor, full of headaches and confusion. However, armed with the criteria outlined within this paper, your selection process can be fairly simple and painless.

Selecting the right solution - with the right partner - can drive immediate value for your organization, give you a competitive advantage, and improve business performance. Most important, your investment with the right company and solution will continue to drive ROI as you further connect documents, people, and processes end-to-end across your organization and gain visibility into your business.

Global 360 has developed a strong approach to ensuring that our customers succeed with their Process and Document Management solutions. The key factors and considerations discussed within this paper are a result of the lessons that we have learned in partnership with our customers over the many years we have been delivering these solutions.

We would be happy to assist you with your selection process and to discuss the requirements unique to your business and industry. For additional information, please visit us at www.global360.com.

Selecting a Process and Document Management Vendor Key Factors and Considerations



Global 360 helps organizations to better manage processes today and make improvements for tomorrow. Our market-leading process and document management solutions improve business performance by maximizing the productivity of all participants in a process. Our more than 2,000 customers in 70 countries have reduced paper, automated processes and empowered individuals to truly change how work gets done.

Global 360, Inc. is headquartered in Texas with operations in North America, Europe, and the Pacific Rim. For more information about Global 360's process and document solutions, please call 1-214-520-1660 or visit the company web site at www.global360.com

CORPORATE HEADQUARTERS

5400 LBJ Freeway, Suite 300
Dallas, TX 75240
Tel: 214.520.1660
Fax: 214.219.7218

United States
Global 360, Inc
1080 Marina Village Parkway
3rd Floor
Alameda, CA 94501

Global 360, Inc
11951 Freedom Drive, 13th Floor
Reston, VA 20190

Global 360, Inc
1225 Jefferson Road
Rochester, NY 14623

CANADA

Global 360 Canada, Inc
1 Place Ville Marie, Suite 2821
Montréal, Québec, Canada H3B 4R4
514.871.0161

ASIA PACIFIC

Global 360 Australia Pty Ltd
PO Box 1917
Level 2, 475 Flinders Lane
Melbourne, VIC 3000
Australia
+61 3-8619-8999
+61 3-8619-8950

Global 360 China Limited
3401A Nanzheng Mansion
580 West Nanjing Road
Shanghai, 200041, PRC
86 21 6327 1024
86 21 6361 7724

Global 360 China Limited
Unit 1202, 88 Gloucester Rd.
Wanchai, Hong Kong PRC
+852 2877 7676
+852 2877 7330

Global 360 (Australia) Pty Ltd - Singapore
Branch
30 Raffles Place
#19-02 Chevron House
Singapore 48622
+65 6720 8030
+65 6720 8039

EUROPE, MIDDLE EAST & AFRICA

Global 360
Palazzo Towers West Montecasino
Cnr Montecasino Boulevard
and William Nicol Drive
Fourways Johannesburg
South Africa
+27.11.510.0330

Global 360 NV/SA
Vorstlaan 360 Bd. Du Souverain
1160 Brussels
Belgium
32.2.67.93.360
32.2.67.93.361

Global 360 France S.A.S.
Les Mercuriales, 40 rue Jean Jaures
93176 Bagnolet Cedex
France
33.1.49.72.31.50
33.1.49.72.31.60

Global 360 Italy S.R.L.
Via Lecco, 49
20052 Monza (Mi)
ITALY
39.039.2308821
39.039.2308149

Global 360 Netherlands B.V.
Marconibaan 10b
3439 MS Nieuwegein
Netherlands
+31.30.6090516

Global 360 Iberia
C/ Velazquez, 94 – 1 Planta
28006 Madrid
Spain
34.91.781.7022
34.91.781.7020
+31.30.6021339

Global 360 Nordic AB
Mäster Samuelsgatan 42
SE-111 57 Stockholm
Sweden
46.8.7058500
46.8.272210