

The key to making any business case lies in the ground work. Before putting pen to paper it is important to properly consider some key questions:

- What are the objectives of the project?
- What are the existing processes and what does best practise look like?
- Where can these processes be improved to achieve best practise?
- Which option will be best to help us achieve the said improvements?
- How will the benefits outweigh the required investment?

In order to answer these questions it is necessary to quantify and value information assets and to identify which elements of existing processes can be improved. This work will draw out the benefits to the organisation. Typically the benefits will be:

- Staff efficiency
- Control of information
- Improved visibility
- Reduced need for physical storage
- Improved response times
- Disaster recovery and risk management
- Remote / home working
- Regulatory compliance
- Reduced costs

When the only way to achieve these benefits is by implementing an Electronic Document Management Solution (EDMS) this represents a strong case for the investment.

A good business case should also tie in with the corporate strategy delivering strategic and tactical benefits. The typical benefits described above are not always tangible with no true means of associating costs. However if the benefits are a means to achieving the overall corporate strategy which has been complied by senior management then the project is in a great position. Common items on business strategies currently include efficiency gains, going "green" and improving customer service, all of which can be helped along by Electronic Document Management (EDM).

## Get the costs right

When writing a business case for EDM it is important to consider all the costs involved in the roll out. A typical project will involve:

- Requirements capture
- Updating of records management policy
- Installation and implementation
- Training
- Change management
- Ongoing support

For smaller implementations a software reseller or integrator should be able to provide all the above services and be able to provide a fairly accurate figure for them.

To put a firm value on staff savings and space savings it is necessary to liaise with the finance department to get salary costs, PAYE contributions, overheads, inflation rates, corporate tax rates and other figures.

You should now be in a position to present: the cost of doing nothing, the cost of investing in EDM and the period before a real return on investment is achieved. If the return on investment period is short, the cost of doing nothing is high and if the benefits help achieve a strategic or tactical aim of the company as a whole then the project should be viewed favourably.