

DOCUMENT MANAGEMENT SYSTEMS

More and more businesses are deciding to “go paperless”. Many business owners and managers want an alternative to paper based filing systems due to the sheer cost of storing files and the space required to store them in.

A document management system allows for documents both scanned and electronic to be sent to and from staff and customers in a quick and easy fashion. Receipts, orders and letters can all be scanned and then stored on the system. Documents can be tracked and if necessary, documents can be password protected for security purposes. A document management system can create efficiencies in your business as it results in less time being spent on filing and managing paperwork, which leaves more time to focus on sales and business development.

The advantages of “going paperless” include:

- Reduced cost.
- Easy access to files via computer anywhere in the world.
- Reduced risk – computer files can be backed up easily, physical files can be lost in a fire / flood.
- More efficient document management.
- An electronic document library is easy to search through (if it is set up correctly).
- Reduced manpower is required to manage computerised document libraries compared to physical libraries of paper files.

There are numerous document management system software packages on the market. However, before you start looking at software, it is essential to decide what you actually need from it, as you would with any other major software purchase. This in turn will depend on:

- your current IT strategy
- your security requirements
- your traceability requirements
- your quality system compliance needs
- what document authoring packages you use/plan to use
- what type of documentation already exists in your business
- what your current software platform is
- what your staff are used to already

MOTIVATING YOUR EMPLOYEES

Understand your staff - Employees are motivated by what they get out of their jobs. This may not necessarily be all about money - job satisfaction and career progression are also important factors in motivating your employees. If you can identify the personal goals of your employees and align these with the goals of your firm, you and your staff will be working towards the same targets. If for example your staff wish to develop their skills, encouraging this can benefit your business as more skilled staff tend to be more productive which can therefore drive the success of the business.

Building a Motivated Team - Building a workplace that stimulates positivity and productivity can be a strong tool in motivating your team. Employees are motivated by personal goals which are in turn driven by external factors like work environment, recognition, salary, bonuses etc. As a manager, you can encourage the firm to recognize the achievements of your staff and encourage them to develop as professionals. This type of encouragement can help you to develop a highly motivated, positive workplace.

Empowerment and Risk Taking - Many businesses shy away from risk. However a certain amount of “positive risk” can be a good thing. Management can encourage a culture of “intelligent Risk Taking” whereby staff take it upon themselves to make non-critical decisions and see those actions through. Training is essential to the success of such an initiative and staff should be encouraged to seek management approval on medium and high risk decisions. However, low-risk decisions such as giving a once-off 2% discount in order to win a £1000 sale can be made by a staff member without risking the entire future of the firm. This type of empowerment makes staff members feel valuable to the firm and serves as a motivating factor to the whole team.

Make Your Team Feel Like Partners - The Best Managers make their employees feel like partners in the business rather than mere team members. When employees feel the ownership of something, they care for it more and work for its betterment. You can start by encouraging entrepreneurial thinking among the employees, explain how the business is run and help employees feel as if they own part of the business. Encourage your staff to make suggestions as to how you can offer a better service or improve a product offering. Include your team in decision-making processes and make them feel like a valuable part of the business. This will motivate your employees to work hard and put extra effort in to their work.

EFFECTIVE NETWORKING

In today's challenging business environment there is an increased focus on networking as a way of bringing in new business. Unlike advertising it doesn't cost a lot and you can do it almost anywhere. Networking itself is easy but effective networking is a more challenging activity.

Before you hand out a single business card it is important to step back and think strategically about your networking activities. To begin with, you should identify the type of people you want to network with – if you want to build up a network of potential customers then you should network within groups of people who are likely to buy your products or services.

Once you have identified your target market, it is time to work out who you need to meet in order to increase your chances of making a sale or getting an introduction to somebody who can benefit your business. If you are attending a networking event you should obtain a copy of the attendee list before the event and identify 3 or 4 targets you would like to get talking to. You should arrive early at the event and take time to familiarize yourself with the layout of the venue. You should take note of areas such as the buffet, coffee station or bar as these are ideal areas to get talking to your networking targets. Simply asking someone to "pass the milk" at the coffee station can be an ice-breaker which can allow you to start a conversation with your networking targets.

Your objective should be to introduce yourself to these targets and obtain their business card. Ensure that you have a good, pre-prepared 60-second pitch about yourself and your business and practice this pitch before going to the event.

The networking doesn't stop once you walk away from the networking event with a few new business cards in your pocket. Networking is all about building relationships. New business relationships result in new sales opportunities for your firm. Therefore, you should head straight to your office and input the details from the business cards into your contact database or CRM system.

Next, you should follow up with an email within 24 hours of the networking event. Something along the lines of "great to meet you, lets catch up for a coffee in the next week or two. How does Friday suit you?". You should also add your new contacts to your eNewsletter distribution list in order to keep in regular contact with your potential new clients.

TIPS TO SUCCESSFULLY IMPLEMENT A CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

Get your team on board - Like any new process or procedure in a business, you need to sell the benefits of CRM to your team. Not only should you explain what the system does, you should focus on how the CRM system will make life easier for the sales team. Focus on benefits like lead tracking, having all customer information in one place, fast and easy access to client and prospect information, etc.

Training - People fear what they do not understand. This is no different in business. Your staff will resist a change over to a new system if they don't understand how to use it. You can avoid this issue by investing in good quality training (if necessary, one-on-one training) in order to make the transition to a new system as easy as possible for your staff. You should also run regular refresher training sessions in order to keep staff up to date on how they should be using the CRM system.

Paint The Big Picture - A good CRM system will assist your sales team in successfully achieving targets. Take the time to explain the firm's strategy in terms of utilizing CRM to generate more sales and retain more customers. Once your sales team connects the dots between CRM system, actual sales and the relationship with the success of the firm and ultimately how this effects their pay packet / personal success, they will buy-in to the idea of CRM as a positive, effective tool designed to help them to do their job.

Acknowledge - Use the reporting capabilities of your CRM system to highlight the achievements of your sales team. During management and / or sales meetings, reports from the CRM system can highlight positive trends such as an increase in new customers, etc. Point out that the CRM system allows you to identify that goals / targets have been reached and acknowledge those who have achieved those goals/targets. This will result in your team having a more positive attitude towards the system.

Please contact a member of our team if you would like to discuss any of the issues raised.