

10 Best Practices for Document Management

Document management refers to all the resources, policies and processes you have in place to store, archive, access and maintain the documents required to run your business.

HOW YOU CAN APPLY DOCUMENT MANAGEMENT BEST PRACTICES AT YOUR COMPANY:

- ✓ **1.** Start with goals and develop key metrics
- ✓ **2.** Prioritize automation of simple and frequently used business processes
- ✓ **3.** Improve paper-based processes instead of emulating them
- ✓ **4.** Capture content close to the point of origin
- ✓ **5.** Make sure the user interface is straightforward and intuitive
- ✓ **6.** Take advantage of the cloud
- ✓ **7.** Create consistent folder and document type structures
- ✓ **8.** Set up (and follow) version-control policies
- ✓ **9.** Use electronic signatures for tighter security and easier compliance
- ✓ **10.** Streamline approval workflows with automation

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