

Needs



ASSESSMENT

**VENDOR-NEUTRAL.
UNBIASED CONSULTING**

Business goals can be met if proper assessment is done prior to implementation.



Don't go the wrong direction!
Get unbiased advice from DataVault.

CERTIFIED, EXPERIENCED CONSULTANTS

Our staff has real-world experience! We are certified with CompTIA for **CDIA+** (Certified Document Imaging Architect) and **Project+** (project management professional) giving us a honed-edge and a keen-eye towards identifying areas in which technology can best be applied. Each year we consistently provide corporations and governmental agencies with workflow and process analysis that specifically defines the goals to be achieved, the present state of affairs and what is necessary to achieve these goals.

DataVault has developed the 'Needs Assessment Tool Kit'. Years of experience is compiled into one software application that will ensure all needed information is uncovered -from personnel surveys, to individual document workflows, document retention and destruction, the business case (ROI) and even a Gantt chart showing the level of effort required and a work-breakdown structure with estimated completion dates.

Check us out on the web at <http://datavault.com/needsassessment> for more information and client testimonials or email our senior consultant byron.aulick@datavault.com



How do you increase profits?
..by reducing inefficiencies!

DataVault will provide facts that you can use to increase the productivity of your business.

We will tell you when, why and how to apply technology to maximize gain within your business.

DON'T IMPLEMENT WITHOUT DISCOVERY!

NEEDS ASSESSMENT -OVERVIEW?

Would you ever consider receiving medical treatment without first being examined and diagnosed by a well-trained, certified and experienced medical doctor? -NO- But many people go ahead and implement an IT solution without first fully understanding the ramifications. Let's talk...

An Electronic Content Management (ECM) Needs Assessment is an indispensable prerequisite for designing and implementing a solution. ECM is not just technology. In fact, it is a business solution that simply leverages the best available technologies. The objectives being business process improvement, automation, productivity enhancement, security, retention and compliance.

Resellers would have you believe that this step is not necessary for a couple of reasons. First, they do not want to identify business or functional requirements that are not addressed by the products they sell. Also, they do not want to jeopardize the sale by including the up front assessment expense. The result, a shoe-horned solution sold by presenting features and benefits without respect to actual requirements.

For these reasons, it is critical that business and functional requirements be gathered by a certified, vendor-neutral ECM professional before designing a system. This is the only way to guarantee that the end result will be a solution that will address your unique business needs.

NEEDS ASSESSMENT REPORT -WHAT'S IN IT?

Our assessment tool kit has evolved over the past 4 years and is used to create a report that is truly complete. Nothing is missed and the presentation is easy to read and fully comprehend. Add our authors' combined 34 years of experience and you have a winning combination!

Table of contents from an actual report (yours may vary):

1. Executive Summary	5. Suggested System Design	6. Implementation Plan
2. Introduction	5.1. Electronic Workflow	6.1. Training Plan
3. Current System/Workflow (graphic)	5.1.1. Workflow Steps	6.2. Change Management Plan
3.1. Mailroom at [client]	5.1.2. Work-Breakdown Structure (in detail)	6.3. Risk-Mitigation Plan
3.1.1. General	5.1.3. File Format Suggestions	6.4. Retention Plan
3.1.2. The Current Workflow	5.2. Software Evaluation and Selection	6.5. SLA
3.1.3. Estimated Labor	5.2.1. Solution "A" (with vendor literature)	7. Critical Paths and Milestones
3.1.4. Estimated File Volume	5.2.2. Solution "B"	7.1. Workflow Paths (Gantt-chart)
3.2. IT Infrastructure	5.3. Design Description	7.2. Milestones (Gantt-chart)
4. ECM Needs/Solution Objectives	5.3.1. Capture and Input (graphic)	8. Business Case
4.1. Overview	5.3.2. Index and QC	8.1. Baseline by Department
4.2. Required Features	5.3.3. End-user Workstations	8.2. Investment Needed
4.3. Acceptance Criteria	5.3.4. Backup Procedures	8.3. Metrics
		8.4. ROI
		9. Post-Implementation Plan

How do I get started?

Call us at (508)798-8080 and ask for Byron Aulick. He is our senior analyst -and more than willing to help you identify your specific goals and then find the right application of technology.

Call now to discuss your specific needs!