

## EDMS Needs Assessment Training Program Business Case

### **Client Profile**

Sable Scanning is a privately owned electronic document imaging small business located in South Africa. They have provided their customers with scanning services, scanner sales, training, and EDMS consulting and software sales for seven years. They have nine employees. Francois deLange is the owner.

### **Challenge**

Sable Scanning had primarily been providing services related for the input (scanning) side of the electronic document management process for many years. They had developed a loyal and growing client base and recognized the emerging needs their clients expressed for electronic document management solutions. However, the Sable Scanning team lacked the expertise and experience to expand their services to meet their client's greater document management needs.

### **Solution**

Sable Scanning discovered that DataVault, Inc, the industry's leading provider of CompTIA CDIA+ certification, also offered a course for equipping EDM professionals to perform customer needs assessments. The President and CEO of the company attended the 2-day class in January 2005 and immediately began marketing the expanded services to existing and new clients.

### **Benefits**

- A clear understanding of the “art” of selling EDM solutions through leveraging their reputation and experience in the input market
- Confidence assessing customer document imaging and document management needs
- Tools and templates to walk them through the entire process
- Keeping their customers from seeking other's services that were formerly outside of their areas of core competency
- A dramatic increase in revenue from sales and services

## **Follow up**

Ten months following the training, Francois de Lange, President and CEO of Sable Scanning, was interviewed. He indicated that his team had performed 14 customer EDM needs assessments since the training. Mr. de Lange also indicated that his company felt very equipped to conduct the assessments and that the tools and templates had performed as presented in the classroom. He was also pleased to see that the training materials and support documents were consistent with and applicable to actual EDMS industry practices outside the classroom. Reinforcing his decision to take the training course, he was pleased to say that Sable Scanning experienced a 35% increase in sales directly attributable to the EDMS Needs Assessment training. When asked if he would recommend this course to others, he stated: "Every imaging or sales person related with imaging should do this."