Technology solutions

Choosing the right software, platforms and applications for your business

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Business owners today may understand that technology can be customized to streamline their internal processes. But exactly how that customization is realized may be unclear.

Software, platforms and applications evolve quickly, which can make finding the right technology intimidating. However, by partnering with the right solution provider, you can improve your current processes with technology that's inherently scalable.

"Business owners are experts in their industry; they shouldn't have to be experts on the technology solutions they bring into their company," says Heather Stump, a business analyst and AIIM ECM Practitioner at Blue Technologies.

Smart Business spoke with Stump about available software, platforms and apps, and how to integrate them in your company.

In your experience, which software and platforms are the most useful?
The most prevalent office applications are the Microsoft Office programs, Word, Excel and Outlook. Other platforms integrate directly with these familiar interfaces to enhance them without replacing what employees currently use, or changing their day-to-day activities.

Imaging applications can be installed on your desktop or embedded in your multifunction printer, which can then:
- Convert documents, such as PDFs and images, to a Word or Excel file on the fly.
- Route documents throughout the enterprise to a shared folder, document management system or email account.
- Name documents at the time of the scan to save time on the back end.

Many document management systems can integrate directly with Outlook or hardware devices. Employees can store and retrieve documents without leaving the familiar email interface, and multifunction devices can allow employees to search, retrieve and print documents directly from a device.

Organizations typically have an accounting and/or a customer relationship management system, such as Salesforce or SharePoint. These systems are vital to any business, but they do require supporting materials to be useful. Technology solutions integrate with these programs to provide a comprehensive view of all necessary data and documentation, such as emails and customer correspondence, eliminating the need to search through multiple systems and file cabinets, reducing the burden on employees.

What are some must-have apps?
Many employees already have a smartphone or tablet, so more businesses are implementing a bring-your-own-device strategy. Most mobile integrations are not device specific and fall into the document or print management categories.

The most well-known document management mobile apps such as Google Docs, Dropbox or SkyDrive allow users to store and retrieve documents. Other apps allow you to take photos or scan from your mobile device, and then upload to the cloud or existing document management repositories. Advanced solutions allow employees to interact with workflow off-site, which facilitates continuity and productivity.

Hardware manufacturers now offer print management apps, so you can print from anywhere, whether on- or off-site. The files are held in a print cloud. The user can then authenticate themselves at any networked device, see their print queue and release the jobs when they're ready. This helps reduce costs and improve information security — people aren't as likely to leave confidential documents sitting around.

How can businesses find a provider to maintain, assess and upgrade technology?
Do your research and trust your instincts. Meet with providers and look at a variety of software packages to get an idea of the distinctions. One tip, on the manufacturer's side, is to see who is spending money on research and development; only innovators survive in the tech industry.

Your solution provider should be assessing the technology quarterly or semi-annually to help you learn new features and functionalities. In addition, manufacturers usually release at least one upgrade and a few minor software fixes every year. Make sure you understand what your provider includes in the yearly maintenance of software or platforms. With due diligence and the right provider to support your software and provide training, you'll better understand the value of your purchase. ●