

Record Center Software Management

Michelangelo's Way

By Christine Spisto

Marketing Communications/Public Relations Director

O'Neil Software

Michelangelo was a leading figure in the Italian Renaissance, which led the world out of the Dark Ages. He was, among other things, a superb sculptor, painter, architect and engineer.

He sculpted the Statue of David, acknowledged as one of the finest ever made. He also painted the ceiling of the Sistine Chapel in St. Peter's Basilica in Rome, which took him four years and is a masterpiece of art. And he designed the dome of St. Peter's Basilica in Rome, which was a revolutionary design.



Now I'm guessing that around about now you are wondering what record center software risk management has to do with a Michelangelo's work? Or maybe you are getting ready to turn the page of this magazine, in hopes of reading an article that you feel is more relevant to your business. But wait – there is a connection...

When this great Master set out to accomplish all that he did, I'm sure that he was well aware of the potential hazards he might face: measurement, model, assumption, scope and cost errors; materials failure; schedule uncertainties and simply human error.

However, for the most part, he must have done his homework before he set out to complete his goals so as to mitigate his risks, because the rest is history.

What about you? How can you apply Michelangelo's risk management to the business of purchasing records management software? With all the various software programs and prices on the market today, how do you know which one to buy?

The good news is that selecting the one that's right for your record center doesn't require a sculptor, painter, architect or engineer's expertise, or even in-depth technical knowledge. Instead, knowing what criteria to consider is half the battle. While there are many software programs to choose from, you can often quickly narrow

them down, using the following tips to minimize your risks.

Determine Your Own Requirements.

The records management software you purchase is going to impact how you do business, streamline your operations, save you time and money, lighten the load on your staff, enhance customer service and reap profits. Your choice will affect your operations every minute of the day, so it's important to assess your facility's needs and business practices. This approach will help pinpoint the unique features needed in your software package. Also important to note: do not approach this purchase as a cost, but rather an investment. A cost diminishes what you have in your pocket; however, an investment returns value.

While your staff should play a key role in your software selection, like Michelangelo you need to take your time, determine your own design/process requirements and then do your research. Nobody knows your business better than you do, so it's critical to map the ideal workflow and the interaction with staff necessary to complete efficient record center transactions/activities. Talk to those in your company who have direct, or indirect experience in tasks currently handled and include anyone who will be working with the new software. Using a product that lacks the necessary capabilities for everyday business operations can create additional work and headaches, rather than offering quality records management solutions.

At the same time, realize that interactions with good software vendors are great opportunities to learn new best practices and operations, which can improve or enhance the way your record center works. Based on your initial requirements and those that arise during the selection process, build a comprehensive list of features and then prioritize them based on what will provide the most value to your business. Also make sure that upgrades and new modules/capabilities can be phased in over time, as your market and business will surely change/grow.

Budget Smart.

Pricing is bound to be one of your primary concerns and can quickly narrow down your selection process. Remember, though, you get what you pay for. Obviously, you'll want software that performs the spe-

cific functions you need and while this technology does not have to be expensive to be good, never buy on price alone. A smart purchase will consider the system's value (as measured by return on investment), rather than thinking in absolute dollars.

Assess Supplier Support and Upgrades.

When automating your business processes, you'll need to have an ongoing relationship with your software company. The reason for this is because even the most computer-savvy users can run into a problem after the technology is installed. So keep in mind the availability and quality of a software supplier's support. Considerations include regular updates, technical questions and training.

Also set some time aside to learn more about the software itself. Make a list of questions and contact your supplier. While serving customers, jot down notes regarding tasks/activities that come up and discuss them with the supplier you are considering, to determine the software's capabilities.

And when it comes to software, support isn't just technical assistance – it often includes access to training, new features, bug fixes and major upgrades. Be sure to assess the supplier's track record in delivering new, high-quality releases.

Consider Supplier Viability.

When choosing records management software to run your record center, the technology isn't all you are buying. You are entering into a long-term supplier relationship, making it critical to consider the particular company's viability. And I'm talking not just if they survive, *but how*. Can and will it invest in new research/development? Will it continue to meet regulatory requirements and support new industry standards?

These scenarios could have big implications, so find out how long each software company has been around as well as assess the supplier's reputation, financial strength and vision for the future.

Don't Forget the Importance of Training.

After purchasing your records management software, you'll want to focus on your next biggest investment (and probably the most important one you'll ever make), that is training your staff. Nothing affects the bottom line of a company more than the time effectiveness of its staff. Yet few do anything serious about it after they purchase software. Sad, really, because if you've spent years planning and thousands of dollars in developing your business, you'll only watch it all go down the drain if you don't get the proper training on the use of your software.



Staff training on the software you choose for your record center helps you wring every dollar of value from your technology investment. And let's be honest, some people need more help than others when learning a new program. Instruction also needs to be more than just lectures and binders. It should involve mentoring and real, hands-on experience and support from trainers who bring years of technical and training experience to the classroom. These experts can provide your staff with short cuts and sound operational advice; teach them how to complete functions they currently perform on a new system faster; and introduce new functionality into your record center operations, saving them time and you money. So it's important that your people get the training they need to perform at their highest skill level.

For those members of your staff who are too busy to attend classes, but need to keep pace with new developments in technology and the records management industry, a good supplier will offer online training, providing relevant knowledge with convenience, flexibility and a cost savings.

One Final Note...

Although most of us will never achieve the great artistic accomplishments like those of Michelangelo, we can follow his lead when it comes to mitigating risks when purchasing record center software. So do your homework, ask questions and remember that no matter what software you choose, there are going to be things you'll have to change to adapt, so be flexible like the great Master. With a little investigation and some common sense, your software purchase should turn out to be as valuable to you, as Michelangelo's masterpieces are to the world.

About the Author: Christine Spisto is Marketing Communications/Public Relations Director for O'Neil Software, headquartered in Irvine, California. She has been in this position for over 5 years, the company she works for the largest and most successful records storage/management software producer in the world. O'Neil has been in business for over 25 years, its software The FIRST Choice of Record Centers Worldwide.