

# Document Management Services

Calleo uses a three step process to a) determine which of your business processes makes best sense to automate and/or relegate away from paper, b) what technology and implementation plan best suites your move away from these manual paper processing methods and, c) how to best train and provide ongoing support for your 'less paper/paper less' technology.

The ultimate goal of this 3 step process is to provide you a strategic method for you to move away from the costly paper based and manual processes to a more efficient and effective document capture and automated forms processing vehicle.

You will also, collectively with other organizations, have a positive impact on helping the environment by lowering the amount of paper produced.

Assessment & Roadmapping  
Technology & Technical Implementation  
Training, Support & Feedback

Step 1 is to take a very high level, unobtrusive snapshot of which business processes are repetitive in nature, high volume, manual, and have inbound paper documents associated with them.

As an example, within every organization, including yours, supplier invoices are processed via Accounts Payable. We will determine the inbound volume of your supplier invoices, if copies are made, how they are filed, and the frequency at which they are accessed. We repeat this 'information gathering' for all inbound paper based business processes you wish to streamline.

We'll also take a quick look at your technology to make sure our recommendations do not conflict with your environment.

With this information at hand we're able to establish what we call a 'Less Paper Roadmap'. The roadmap is structured in a timeline, with what we feel, will be the most appropriate method to automate or eradicate paper based processes. Each item on the roadmap will contain a price estimation, the total cost of ownership and return on investment calculations.

Without any obligation, you will have everything you need to decide if you want to move forward.

If you do decide to move automate your manual paper based processes, Calleo, where it can, will organize trial software and/or prototypes of the technologies so you can determine if the technology will do what its supposed to do.

Step 2 is a stage where the exact technology, technical specifications for ERP or CRM back office connectors, forms processing templates, etc. are identified & defined.

You've probably already seen a demo of the product, viewed a prototype and/or been exposed to trial usage of the technology. You therefore have a reasonable understanding and comfort level of how the project & technology will unfold, implemented, and the overall benefits of the project.

We then assign a Project Manager, who then assembles a project plan. The plan includes timelines, people usage, project milestones and test criteria. The project plan will mitigate any cost risks, and minimize any surprizes along the way.

If any ERP/CRM back office connectors or rules based templates need to be selected, developed or customized for your environment they would be during this stage of the project.

The Project Manager then implements the project, using the project plan as a guideline.

Reaching a milestone and performing predefined tests will ensure the project is completed successfully.

Step 3 is an exceptionally important stage, where we ensure you are fully conversant with any new technology (e.g. Document Capture, Automated Forms Processing, Document Recognition, Document Workflow, etc.), and the processes that accompany the technology. We want you to use the technology so you can recognize the full benefit.

From a support perspective, we support all technologies that we implement. Our support services are Service Level based, so you can be assured that you will receive high quality services - all of which are defined in our support services agreement.

Your business is dynamic - it changes, and therefore feel it is important to let you know if anything additional within our 'less paper' scope requires attention. We usually perform follow up reviews (initially on a 6 month rotating basis), and if

we find any paper based process that requires attention you will be made aware.

[More Information...](#) [More Information...](#) [More Information...](#)

Calleo is a Toronto based business and technology consulting company, with a strong focus to assist our clients to reduce paper within their workflow and remove the inefficiencies associated with paper processing. Our service and technology strengths are by design - attributable to our partnership alliances, our responsibility and accountability for results, and the use of best practices for all engagements. All services & technology are structured to move you closer towards reducing your organizational inefficiencies.