# 5 TIPS FOR SELECTING A DOCUMENT AUTOMATION SOLUTION

Many organisations have time consuming, paper-based processes. If you think about the simple process of a customer on-boarding process for a services organisation, best practice typically involves having an agreement signed between the customer and organisation that defines the type of engagement, rates, and legal aspects of the engagement (limitations of liability, processes for disputes etc). Even in a somewhat electronic process, the best case scenario is that this would involve:

- Manually populating a Microsoft Word template with the customer and contract details
- Emailing that document to the customer for printing and signing (and perhaps a couple of revisions back and forth)
- The customer will print this contract to paper, manually sign it and email it back to the organisation
- The staff member may or may not place that document in a location that is going to be findable in 2 years time should the contract be needed

This sort of process has a number of potential issues, including:

- It's difficult to ensure that the contract is completed in a consistent manner between customers, not to mention ensuring that the latest correct version is being used.
- From a customer experience standpoint, this is not a good experience and can cause delays in the closing of new business if the customer isn't tech saavy, or strong with administrative processes.
- There's a strong risk that the contract is not filed correctly, or even at all, meaning that when that contract is needed, staff may not be able to find it.

## 1. Capture all data in your CRM

Make your CRM system the hub of all customer centric information. This ensures your information can be used to pre-fill your document templates and will allow you to save a significant amount of time. Gone will be the days when you need to tediously copy and paste information, or type it out. Replacing this - a single click.

## 2. Ease of Use is King

It's important to use a system that is easy to set-up, manage and use. Managing your document templates shouldn't have to be a tiresome awkward experience. It should take no more than 5 -10 minutes to get set-up, and should allow you to quickly get to grips with building your templates.

## 3. Make sure the system supports common tools

Being able to build your template using Microsoft Word, Excel or Powerpoint means you will have much more flexibility when it comes to the look and feel of your documents. If you have certain style guides that need to be kept up-to-date over time, your document templates will need updating over time as well. Having the ability to change these yourself means you won't need to pay a developer, and can make these changes instantly .
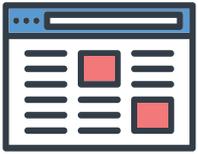
## 4.  Pick a system that is flexible

When it comes to document generation, it's important to choose a solution that not only does the basic stuff well, but is flexible enough and has a core feature set to support complex document requirements. Ask about the ability to reference multiple data locations in your system. Does the system support looping through related data, conditional sections, formulas and calculated fields? These more complex abilities provide you with useful room to grow, should you need to build more involved documents.

## 5.  Does it integrate with eSigning Solutions?

If legally binding electronic contracts and agreements are important to you, picking a system that integrates with your eSigning solution is key. Your document automation system should seamlessly generate a document and be able to send this through your eSigning solution, capturing the document back into the CRM automatically once it's signed. This will significantly reduce the time both your staff and customers will need in completing the signing and returning the document.  Some document automation systems will integrate with all major eSigning systems, so if you do decide to switch for any reason, it will always support the major system you've selected. These typically include DocuSign, HelloSign, EchoSign and Adobe eSign.