

# 10 things to look for in an enterprise document management vendor

A practical guide to choosing an EDM vendor

# Choosing an EDM vendor



An enterprise document management (EDM) system can help hospitals and health systems go beyond simply storing data to making it possible to truly realize the potential that is inherent in these data. The right solution can be used strategically to access data to meet organizational goals, such as improved care, enhanced patient experiences, and reduced costs. That's why it's so important to choose the right vendor, whether selecting this technology for the first time, or making a switch.

Choosing an EDM solution is a big investment in time and resources, so an organization needs to be prepared. First, evaluate your current situation and your long-term objectives. Does your current system capture the data you need? How would a new system do so differently? Can the EDM solution meet your needs? It is important to do your homework to ease the pain of transitioning to a new system. Request live demonstrations, search publicized ratings, talk to other hospitals, and compare capabilities.

Talking to other hospitals is especially crucial, because when it comes to choosing an EDM vendor, the healthcare industry has its own unique needs; you'll want to find a technology and support team that can configure a solution to meet your specific requirements. You don't want to be on a platform that wasn't specifically built with your market in mind. You'll want to be certain your EDM is as adept at handling clinical content as it is with your other enterprise content. Check the credentials of your prospective vendors to find the right fit.

## When evaluating EDM vendors, there are 10 key capabilities

**1. Compatible operations.** You are looking to incorporate technology that meets both your clinical and nonclinical needs, so it's important to have a solution that works well with not only your organization's main platform, but also your other technologies in operation. Look for a vendor that works closely with you to integrate the EDM with your Electronic Medical Record (EMR) and Enterprise Resource Planning (ERP), and that has a team that will be in the trenches with you to work out unexpected issues.

**2. Vendor stability.** Look for outside verification of a company's strength. Verify a history of long-term leadership. How long have the prospective vendors been in the healthcare market? Are they solely in the healthcare market? How often have they been recognized by credible industry organizations such as KLAS? Look at the KLAS report for direct feedback from the company's customers. Check for a listing on the Fortune 500, recent investments in the company, or even the organization's financial reports if the vendor is a publicly traded company. You want evidence of reliability and longevity. Will they still be around in 20 years? The company representing the EDM solution should be trusted, with a solid track record in healthcare. They should not only keep up with competition, but also stay ahead of your needs and communicate their vision and roadmap.

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**3. Overall product quality.** When it comes down to the product itself, it should be a quality product that is user-friendly and intuitive. It should also be adaptable, so that if something needs to be adjusted, it's taken care of quickly with little to no downtime. Ask the company about their product upgrades and expect them to oversee a smooth process.

**4. Quality of implementation.** It's critical to have an implementation team that understands how you're going to be using the product, and that helps you build a strong foundation. They should be able to deliver a tailored level of attention. Expect a team to put the solution in place with minimal interruption. Expect the team to be on site to support the transition as you roll out the system. Verify that training is provided.

**5. Tailored training.** You should expect ease of use with the product, but for the training you do need, you want a vendor that has flexibility. You should be able to decide the agenda, and expect to be taught how to use the application, how to navigate the system, and how to make configuration changes later. Search for a tailored approach—because your implementation is not like any other. Expect the team to come on site, providing direct experience with the product. Ask if there is an extra cost for this training.

**6. Strong service and support.** You've had your questions answered during the sale, but what happens when questions come up after implementation? When selecting an EDM vendor, you need to know that you have a dedicated team that you can trust. The service and support team should work hand-in-hand with the implementation and training teams. They act as your knowledge base, answering any and all questions. You want a regular, reliable contact who will be attentive to your needs. Expect a proactive, personalized approach. And that any issues will be resolved in a timely manner. There should be a customer-centric support model to assist after you are live with the system. Being prepared with resources in place will ensure that your team has seamless access to data once you go live. Support people should be responsive and find resolutions quickly. Your own team should feel comfortable being able to reach out to the vendor's support personnel.

**7. Delivery of new technology.** Look for a company with a solid vision, one that is proactive in applying emerging technologies and has the ability to deliver a state-of-the-art product. Consider asking current customers if the vendor makes useful improvements or creates new functionality based on user suggestions. Ask the company to share their product roadmap. Do they provide consistent updates and communications?

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**8. Has needed functionality.** Your system must drive tangible outcomes for your business. Look for a vendor that assists and strategizes along with you, providing options and solutions that will work for you. Your team must be able to assist with integration challenges and improve inefficient processes.

**9. Executives are accessible.** Is the organization agile? Does the company have several layers of administration before your questions and concerns reach executives, or is it agile enough for executives to play a role in the needs of its customers? Make sure the company is invested in your application needs.

**10. Value of solution.** Most health systems are looking for a solution that fits their budget and fits well with their long-term plans. Ask those currently using the solution about their overall satisfaction and if they'd purchase it again or recommend it to others. Your vendor should provide value-added services and a controlled total cost of ownership, with no hidden fees.

During the EDM selection process, it is easy to focus on the more immediate gains and lose sight of healthcare information technology's far-reaching impact. That's why it's important to thoroughly evaluate your choices in vendor and in product. To learn more about the latest release of Quantum Enterprise Content Solutions from Quest Diagnostics, or to request a tailored demonstration, contact us at **1.888.491.7900**, or [send us an email](#).

## Additional resources

- [Quantum.com](#)
- [Quantum Insights Blog](#)
- [Intelligent Data Capture](#)
- [Deep Search](#)

