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Ten Essential Steps to Successfully Implement a Microsoft 365-Based Document and Email Management Solution (DMS)

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▶ Keith Vallely has been in the Document Management business for more than twenty years. Here are his 10 most important steps a firm or company leader should take when planning a DMS project.

You have been implementing and deploying DMS solutions for a generation. Take us through the essential steps to a successful DMS on Microsoft 365.

Keith Vallely: You want people in the organization that have experience with the business to help design an appropriate solution specific to your business. As soon as your team determines a move to a cloud-based DMS like Epona, it's time to reach out to management and identify your team members and roles.

In my experience, you need a great team to manage the process from beginning to end. Making sure you have the right team is key, including the right number of technical people and subject The team should also include "cheerleaders," folks who want to take part and are excited to promote the project inside the organization.

Having a solid team is at the heart of every successful endeavor. You stress having internal promotion as a key to a successful project. Why is that?

Imparting clear information when dealing with change in any organization is of prime importance. Cheerleaders support the value of this type of change and what it means for the success of the organization. Communicating new features and outlining the benefits ease concerns of your team. In this stage, focus on understanding your pain points and connecting those with the features that alleviate those pain points.

What are some of the common pain points you run into on a regular basis?

Common pain points vary from no current DMS solution to

Successful DMS Checklist

- [ ] Gathering Your Team
- [ ] Obtain Sponsors and Communicate Benefits
- [ ] Determine Internal Teams
- [ ] Initiation and Analysis
- [ ] System Education – People, Processes and Technology
- [ ] Customize – Design and Build
- [ ] Qualify – Test and Acceptance
- [ ] End-User Training
- [ ] Pilot
- [ ] Deployment
- [ ] Ongoing Training and Support

solutions lacking specific functionality/lack of user adoption to the rising costs without added benefits.

What guidance can you offer as to who should be on your team?

Daily users from key groups are critical to assist in setting up your new environment and DMS testing. For a successful DMS implementation, gather anyone that has a stake in your enterprise. Then, outline their involvement and roles to assist in setting up your environmental architecture and DMS testing. These should be daily users of integral systems and processes which need to be included in the design of the new system. One or 2 individuals from key groups should be represented.

Gathering those who have extensive working knowledge of integral systems and processes can contribute to a better design of the new system. What's next in the process?

As your implementation partner, Epona will perform a thorough evaluation of your current system and practices. This stage helps identify any potholes that might pop up, such as preparatory projects (ex: upgrading to 64-bit Office software or other network configurations) that may be hiding on the road to a smooth transition.

Ensuring customers' environments are up-to-date and ready for a new cloud based Epona DMS on Microsoft 365 is invaluable. What's next?

At this stage, Epona focuses on the 3 most important aspects of your enterprise - People, Processes and Technology. Consultants work with your team to familiarize themselves with new processes and technology such as storing and profiling your content in your security framework and assisting your team in designing the best possible DMS to fit your unique business needs.

In creating the best possible DMS, walk us through the Design phase of a project.

This stage focuses on designing and building the perfect system, allowing users to easily accomplish daily practices such as accessing, working on and saving their content, as well as easy content searching and filing emails.

Would you elaborate on both the Design and Build phases?

In the Design phase, a representative group of users is brought in to determine best practices for your organization including day-to-day workflows, folder structures, document naming conventions and more.

In the Build phase, communication with highly technical members of your team is of great importance. They will assist with providing the access to your environment, current security models to follow, and Microsoft Tenant Managed Add-Ins, among other things.

You have the new solution designed and built to the customer's specifications. Is there a Quality Control phase and what does this entail?

Upon completion of building the DMS to the agreed design specifications, it is time to perform quality control testing to ensure functionality meets expectations. After the initial design has been tested and approved, we begin testing any migrations and finalize training procedures for the end-users.

What type of end-user training does Epona offer?

Epona offers virtualized training as part of the initial project and/or can provide onsite training (for an additional cost). It's highly recommended that organizations consider onsite training as it provides a more intimate and effective

method of training for end-users. It allows our trainer(s) to assess and attend to any problem areas more easily while on-site. This is hard to achieve with virtual training for obvious reasons.

Epona end-user training can be extensive in accordance with the customers needs. Training is continuously available throughout and after the project. End-user training is a critical component for user adoption and the success of the project.

Makes perfect sense that onsite training is more effective than virtual. So, you have designed, built, and quality control tested the DMS. What comes next?

Before deploying your new DMS, make sure you test in a pilot environment. This stage will help your project group shed light on any remaining roadblocks or potholes which could impact a successful, seamless transition to your new DMS. The group will be working with Epona to smooth out any speed bumps discovered, as well as determine best practices for the rest of the organization.

Providing a test pilot environment prior to deployment sounds like a great way to ensure the environment is exactly what client wants before deploying. Tell us about the Deployment phase of the project.

The design has been accepted and we are ready to go-live with your DMS organization-wide. Migration finalization, site creation and training plans are completed and scheduled, with all 3rd party integrations completed. Now your Project Group transitions the main point of contact to the Epona support and training team. Ongoing additional meetings can be scheduled with the project manager if necessary.

Ongoing support will be a critical factor to the success of the overall project success. What kind of ongoing training and support does Epona provide?

Ensuring success will require high end-user adoption. Epona ensures this with training classes online or in-person. Classes include refresher-style training after everyone is up-and-running. Epona also provides training documentation, helping new users onboard quickly, coupled with ongoing technical support for any issues that arise. We make certain that everyone understands how to use their new Epona DMS effectively while operating with high efficiency.

It is apparent you have mastered a step-by-step plan to successfully deploy a Microsoft365-based DMS solution. In closing, what are some of the benefits your customers can look forward to by moving to a Mirosoft365-based DMS?

I called a customer two days ago, who had a disaster conversion from their legacy systems to the Microsoft 365 platform and Epona DMS. It had been 2 years since I last spoke to them. When the Teams video call started, the client's face lit up and he greeted me warmly. He told me that, although the first 3 weeks after conversion were exceedingly challenging, in the last 2 years the firms' lawyers have been in love with the new system. This tells me that the Microsoft platform answers the call for the legal profession. My client's lawyers (his partners) were more productive than before. That says it all.

Keith Vallely has started numerous businesses with varying degrees of success, culminating with a multi-time award winning Entrepreneur Magazine HOT 100 business in the technology sector. In 2011, Keith joined Epona USA, as the Director of US Sales, and as their first employee in the United States, to open the USA office and begin the process of spreading the power of SharePoint as a DMS platform for the Dutch-based Epona Legal BV. Reach him at keith.vallely@epona.com