

# 5 Signs It's Time to Get Rid of Your Legacy Document Management System



Every day, dozens of documents flow in and out of your business. The system that stores and manages these documents is critical to your operational efficiency.

If a firm is in its infancy stage, simple document management methods such as binders, a single computer server, or portable drives may suffice. But once you get more clients, you'll need more sophisticated document management systems that meet the growing demands of your increasingly complicated document workflow.

While it's possible to go on business as usual with what was initially there when you started, you should watch for signs showing you've outgrown the legacy systems.

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**Here are a few common signs to help you evaluate whether it's time to consider alternatives that better serve your business, staff, and clients.**

## 1 You're spending too much time managing files manually.

Document management technology has evolved significantly over the past decade. Most manual document workflows are now easily automated to save time. Admin tasks such as setting up folder structures for a new client or a new engagement, requesting client-prepared documents, sharing files online, or getting signatures on contracts or release forms should only take a few clicks and minutes to complete.

If you or your staff currently spend hours on these tasks, you should know that the best-in-class document management system is available to simplify these processes. And it's time to explore alternatives to allocate your time better.

## 2 Employees and clients have repeatedly complained.

Employees and clients are the most important stakeholders of your firm. They also interact frequently with your document management and file-sharing systems.

When you receive frequent complaints from employees or clients about their experience with your current document management system, you need to take their opinions seriously. You don't want to frustrate employees or clients with an easily solvable issue.

### 3 It's difficult or expensive to maintain and fix.

The total cost of any system is a combination of the purchase price and its ongoing maintenance. Ask yourself, how often do I spend time or money maintaining the current system? Am I or are my staff on the phone constantly with IT to troubleshoot problems? Does my team/clients suffer from frequent downtimes because of system issues? And is fixing problems becoming more expensive than the price of a new solution?

If you've answered yes to most of these questions, you should take some time to understand the real cost of your current system. After adding up the time and resources spent on maintenance, you might find out that it's prime time to look for an alternative solution that's more stable and cheaper to upkeep in the long run.

### 4 You're resisting change out of fear.

You may already know that it's time to get rid of your legacy systems, but the thought of going through a system migration is so daunting that you just default back to what you already have. While not a good reason to resist positive change, the fear of change is commonplace for businesses strapped for resources and time.

The good news is you don't have to let the fear of change stall progress. You can effectively manage change if you apply the right steps throughout the journey. A quick hint: it starts with aligning expectations from your internal stakeholders and external clients. If you're interested in learning more about how to effectively implement change, check out our Change Management Toolkit eBook for more guidance.

### 5 Security and compliance are afterthoughts.

The last sign that the legacy system is on its way out is when it cannot fulfil the appropriate security and compliance standards.

As accountants, you handle clients' confidential and sensitive information daily. Are you storing and managing such information in a way that's secure and compliant with industry regulations? If a hacker breaks into your email inbox and gets a hold of your server, are you confident that all your files are encrypted against security breaches and you'll be able to recover any loss of data?

Think on how your current system will respond in these scenarios. Feeling slightly panicky because you don't know the answer? Well, that means you need to take a look at solutions that come with built-in security and compliance measures so you can operate with peace of mind.





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