

5 Steps to Get Leadership Buy-In for a New Document Management System

Your team is losing hours every week to document chaos, searching for files, chasing approvals, re-entering data. You know a modern document management system would fix it. Now you need to convince leadership to fund it. Here's how to build a business case that gets approved.

1

Quantify the Cost of Inaction

Calculate the hours your team loses each week to searching for documents, chasing approvals, and re-entering data, then convert those hours to real dollars.

Industry average: 2.5 hours per person per day lost to document search.

2

Build the ROI Case

Frame your case around three buckets: direct cost savings, productivity gains, and risk reduction. Most organizations see ROI within 6-18 months.

3

Address Objections Before the Meeting

Be ready for "We have SharePoint," "No IT bandwidth," and "What's the total cost?" Proactive answers build executive confidence before the ask.

4

Propose a Pilot, Not a Full Rollout

Start with one high-pain process, AP automation, contract management, or HR documents. Let the results make the case for you.

5

Tie It to Something Happening Now

Connect your proposal to an upcoming audit, a recent process failure, or an active digital transformation initiative. Timing is everything.

Leadership doesn't invest in software, they invest in outcomes. When you frame your case around the cost of inaction, a credible ROI, and a low-risk path to proving value, approval becomes much easier to secure. Paperwise can help you build your internal business case from the ground up.

Ready to get started? Visit paperwise.com

