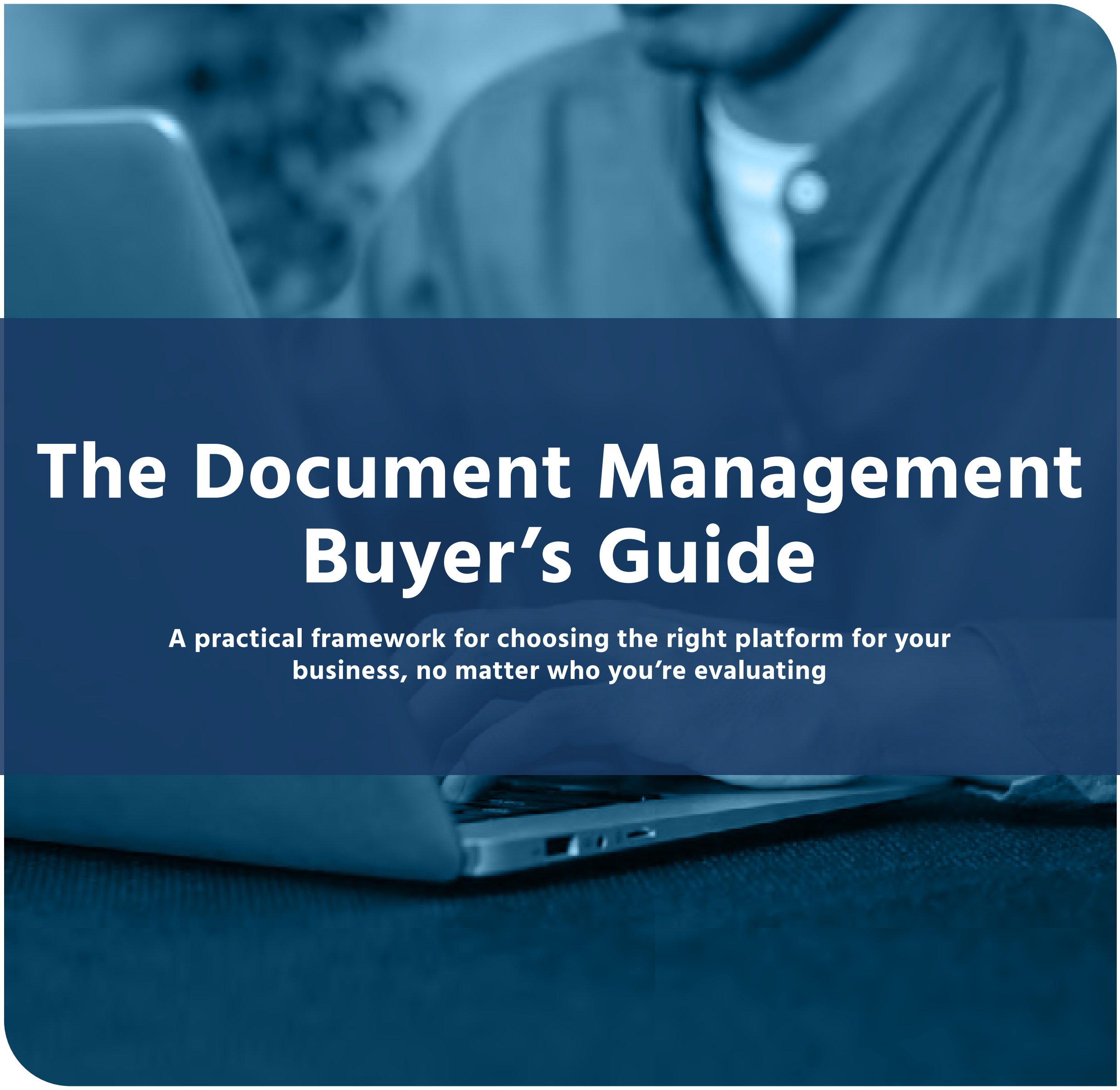
The Document Management Buyer’s Guide

A practical framework for choosing the right platform for your business, no matter who you’re evaluating



GUIDE | DOCUMENT MANAGEMENT

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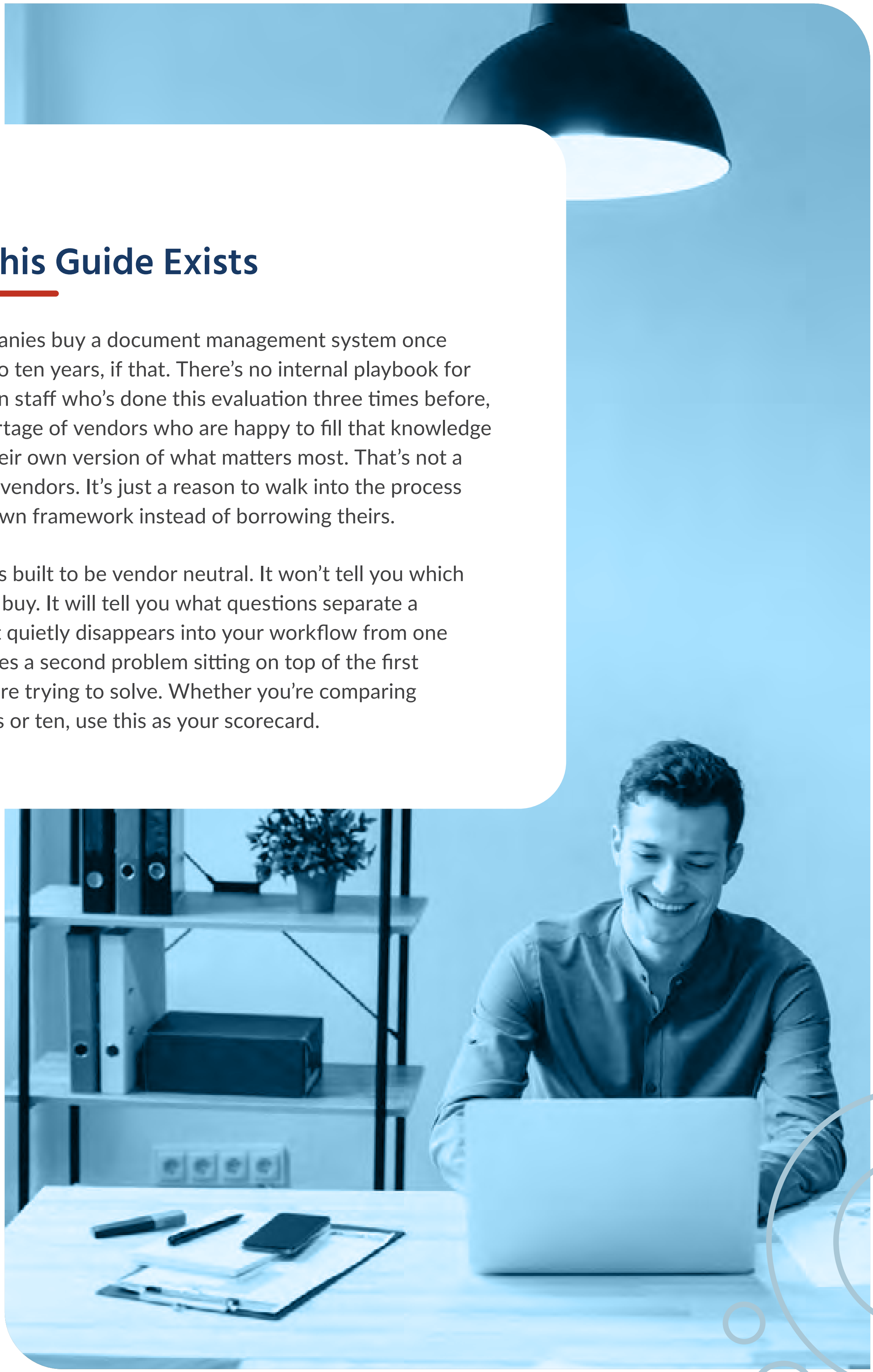

Why This Guide Exists

Most companies buy a document management system once every five to ten years, if that. There's no internal playbook for it, no one on staff who's done this evaluation three times before, and no shortage of vendors who are happy to fill that knowledge gap with their own version of what matters most. That's not a criticism of vendors. It's just a reason to walk into the process with your own framework instead of borrowing theirs.

This guide is built to be vendor neutral. It won't tell you which platform to buy. It will tell you what questions separate a system that quietly disappears into your workflow from one that becomes a second problem sitting on top of the first one you were trying to solve. Whether you're comparing two options or ten, use this as your scorecard.

Signs You Need a Document Management System

Some of these will feel obvious once you see them written down. Others are easy to normalize because they've been true for so long that no one questions them anymore.

TIME SIGNS

- Employees regularly spend more than a few hours a week searching for documents that should take seconds to find
- Approvals stall because paperwork is sitting in an inbox, a physical tray, or someone's desk
- New employees take weeks to learn where things are filed, and tribal knowledge is the only real system of record
- Month end close routinely runs long because documentation is scattered across email, shared drives, and filing cabinets

RISK SIGNS

- You've had at least one instance where a document couldn't be located during an audit, a customer dispute, or a compliance review
- You're not fully confident you could answer "who accessed this document and when" if asked
- Retention and destruction of records happens inconsistently, or not at all, rather than on a defined schedule
- Sensitive documents (HR files, contracts, financial records) are accessible to more people than they should be, simply because there's no permission structure in place

COST SIGNS

- You're paying for physical storage, whether that's on site file cabinets or an offsite storage vendor, for documents you rarely if ever access
- Printing, mailing, and courier costs are a recurring line item that hasn't been questioned in years
- Rework from lost, duplicated, or misfiled documents is common enough that your team has just built workarounds for it

GROWTH SIGNS

- You're opening new locations, adding departments, or scaling headcount, and your current filing approach clearly won't hold
- A recent acquisition or merger left you with two incompatible ways of storing and finding documents

If two or three of these sound familiar, it's worth taking the evaluation seriously. If most of them sound familiar, the cost of waiting is likely bigger than you think, which brings us to the next section.

The Real Cost of Waiting

It's easy to underestimate what manual document handling costs because the cost is spread out across dozens of small moments rather than showing up as one line item. A few minutes here searching for a contract. An afternoon there rebuilding a file that went missing. A delayed invoice because the supporting paperwork hadn't made it to the right desk yet.

Add it up across a year and a mid sized team can lose hundreds of hours to document related friction, hours that show up nowhere on a budget but are very real on a calendar. Beyond the time cost, there's an opportunity cost: every hour spent hunting for a document is an hour not spent on the work that actually grows the business or serves the customer.

There's also a compounding effect. The longer a company waits, the more documents accumulate in the old system, and the bigger the eventual migration and cleanup project becomes. Waiting doesn't make the problem smaller. It makes the eventual fix more expensive.

Understanding the Types of Solutions in the Market

Not all document management solutions are built the same way, and understanding the category a vendor falls into will help you anticipate cost, complexity, and fit before you're deep into a sales process.

Point solutions

These handle one specific function well, such as eSignature only, or storage only, with no broader workflow or capture capability. They're often quick to adopt and inexpensive on their own, but if you need more than that one function, you'll end up stitching together multiple point solutions and managing the integration work yourself.

Modular platforms

These offer a core document storage system with capture, workflow, eSignature, and integrations sold as separate add on modules. The advantage is flexibility, you only pay for what you need today. The risk is that your real cost only becomes clear once you start asking what each additional capability costs, and total spend can climb well past the number you were initially quoted.

All in one platforms

These combine document storage, capture, workflow automation, and eSignature into a single system with one implementation and one point of accountability. This tends to reduce total cost of ownership and simplify vendor management, though it's worth confirming the platform is genuinely unified rather than several acquired products loosely connected under one brand.

Industry specific platforms

Some vendors build specifically around the document types and compliance requirements of a particular industry, such as transportation, healthcare, or insurance. This can mean faster implementation and better fit out of the box, but it's worth confirming the vendor has real depth in your industry rather than a single case study they lead with in every conversation.

Knowing which category you're evaluating helps you ask sharper questions and avoid comparing a point solution's price tag to an all in one platform's price tag as if they were the same thing.

Key Evaluation Criteria

Implementation and time to value

Ask how long a typical implementation takes for a company your size, from signed contract to your team actively using the system day to day. Solutions that require months of custom development before any benefit is realized carry real hidden cost, even when the sticker price looks attractive. Ask for a realistic timeline broken into phases, not just a single number.

All in one platform versus a la carte modules

Confirm directly whether the features you need, capture, workflow, eSignature, integrations, are included in the core platform or sold as separate add ons. Ask for a complete list of what's bundled and what isn't, in writing, before you compare pricing across vendors.

Industry specific fit

A generalist system will handle basic filing fine, but industries like transportation, healthcare, insurance, and manufacturing have specific document types, workflows, and compliance requirements. Ask for examples of how the vendor has solved problems specific to your industry, and ask to speak with a reference customer in a similar business.]

Integration capabilities

Your document management system needs to work with the ERP, accounting, and line of business systems you already run. Ask which integrations are pre built and proven versus which would require custom development, and get a realistic estimate of what that custom work would cost and how long it would take.

Security and compliance

Confirm what certifications and compliance frameworks the vendor supports, how documents and data are encrypted both at rest and in transit, who has access to your data internally at the vendor, and what their incident response process looks like. If you operate under HIPAA, GDPR, or similar requirements, ask for their specific documentation covering those obligations rather than a general assurance.

Ease of use and adoption

The best system is the one your team will actually use without resistance. Ask about the learning curve for non technical staff, what training looks like, and whether there's a way to pilot the system with a small group before a full rollout.

Scalability

Ask how the system performs as document volume grows significantly, whether pricing changes meaningfully at higher volumes, and whether the platform can support new departments, locations, or use cases without a re implementation.

Support and training

Ask how the system performs as document volume grows significantly, whether pricing changes meaningfully at higher volumes, and whether the platform can support new departments, locations, or use cases without a re implementation.

Total cost of ownership

Covered in depth in the next section, but at a high level: look beyond the initial quote and ask for a realistic multi year cost projection based on your actual expected usage.

Total Cost of Ownership: What to Actually Factor In

The number on the initial quote is rarely the full picture, and the gap between quoted price and actual spend is where most buyer's remorse comes from. Build your own total cost of ownership model using these categories:

Upfront costs

- Implementation and setup fees
- Data migration from your current system
- Initial training for your team
- Any hardware needed for scanning or mobile capture

Recurring costs

- Base platform licensing, typically per user or per document volume
- Any modules not included in the base platform (capture, workflow, eSignature, integrations)
- Support tier upgrades beyond what's included by default
- Storage costs if pricing scales with volume

Growth related costs

- How pricing changes as you add users, departments, or document volume
- Cost of expanding to new integrations as your tech stack changes
- Cost of additional training as you onboard new employees over time

Exit costs

- Whether there are fees to export your data if you ever switch systems
- What format your data would be exported in, and whether that format is usable elsewhere
- Contract length and any penalties for early termination

Ask every vendor to walk through a three year cost projection based on your actual expected usage, not just a starting price. A vendor who can do this confidently and transparently is telling you something important about how they operate. A vendor who can't, or won't, is telling you something too.

Building Your Internal Business Case

Even when the evaluation criteria are clear, getting budget approved requires translating this into language leadership cares about. A few approaches that tend to work:

Quantify the time cost

Use a rough calculation: number of employees affected, multiplied by hours per week spent on manual document handling, multiplied by their fully loaded hourly cost, multiplied by 52 weeks. This alone is often a bigger number than people expect, and it's the easiest one to defend in a budget conversation..

Quantify the risk cost

If your business has ever faced a compliance issue, a failed audit finding, or a legal dispute where documentation was a problem, that incident is worth citing directly. Risk avoidance is often a more persuasive argument to a CFO than efficiency gains alone.

Tie it to a strategic priority

If the business is planning to scale, open new locations, or pursue an acquisition, connect the document management investment to that plan specifically. "We need this to operate efficiently" is a weaker pitch than "we need this in place before we can support three new locations without adding headcount.".

Bring a realistic timeline and cost range, not just a problem statement

Leadership responds better to "here's the problem, here's roughly what it costs to fix, and here's the timeline" than to a general request to "look into some options."

Implementation and Change Management

Even the best system fails if your team doesn't adopt it. A few things worth planning for before you sign anything:

Assign clear internal ownership

Someone on your team needs to own the rollout, not as a side project, but as a defined responsibility with time allocated to it. Projects without a clear owner stall.

Expect a phased rollout

Most successful implementations start with a single department or document type, prove out the workflow, and then expand. Trying to migrate everything at once increases risk and makes it harder to isolate problems if something doesn't work as expected.

Plan for data migration realistically

Moving historical documents into a new system takes longer than people expect, especially if existing files are poorly organized or inconsistently named. Ask your vendor what migration support they provide and get a specific timeline.

Involve end users early, not just at training

The people who will use the system daily should have input during the evaluation, not just a training session after the decision is already made. Their buy-in during the process makes adoption after launch much smoother.

Set a realistic timeline for full adoption

Go live is not the same as fully adopted. Expect a period of adjustment, and plan check ins at 30, 60, and 90 days post launch to catch and fix adoption issues early.

Common Mistakes to Avoid During Evaluation

Evaluating on price alone

The cheapest quote rarely reflects the full total cost of ownership, and a low upfront price with expensive add ons often ends up costing more than a higher upfront price that includes everything you need.

Underestimating the internal effort required

Even a well run implementation requires real time and attention from your team. Go in with a realistic view of what internal resources will be needed, not just what the vendor will handle.

Skipping reference calls

A reference customer in your industry, ideally similar in size, will tell you things a sales conversation won't. Always ask for at least one, and ask that reference specifically about implementation experience and ongoing support, not just whether they're happy overall.

Letting one department drive the decision alone

Document management touches multiple teams. A decision made in isolation by IT, or by finance, or by operations, often misses requirements that surface later and force a costly rework.

Not asking about the roadmap

A platform that meets your needs today but has no clear direction for future development may leave you needing to switch systems again sooner than expected.

Questions to Ask Any Vendor

On implementation

- What's a realistic implementation timeline for a company our size, broken into phases?
- What does data migration from our current system look like, and who does that work?
- What internal resources will you need from us during implementation?

On functionality and fit

- What's included in the base platform versus sold as an add on?
- Can you share examples and references from companies in our industry?
- How does the platform handle our specific document types and workflows?

On integrations

- What integrations do you support out of the box for the systems we already use?
- What would a custom integration cost and how long would it take?

On security and compliance

- What security certifications do you maintain, and can you provide documentation?
- How is our data encrypted, both at rest and in transit?
- What does your incident response process look like if there's ever a security issue?

On support

- What support is included in the base price, and what requires a higher tier?
- What are your response time commitments in writing?
- Will we have a named point of contact or a general support queue?

On cost and contract terms

- Can you provide a three year total cost of ownership projection based on our expected usage?
- How does pricing change as our volume or user count grows?
- What are the contract length, renewal terms, and any fees to export our data if we ever leave?

On the roadmap

- What's on your near term product roadmap?
- How often do you ship updates, and how are customers informed of changes?

RFP Checklist Summary

Use this as a fast reference when scoring proposals side by side. A more detailed version of this checklist, broken out by category, is available as a standalone document if you're issuing a formal RFP.:

Yes	No	
☐	☐	Implementation timeline provided in writing, broken into phases
☐	☐	Clear, complete list of what's included in base pricing versus sold as an add on
☐	☐	Relevant industry experience with at least one verifiable reference
☐	☐	Documented security certifications and compliance support for your specific requirements
☐	☐	Pre built integrations confirmed for your key systems, with realistic cost and timeline for anything custom
☐	☐	Training and onboarding plan included, not billed as a surprise add on
☐	☐	Support model with defined response times, in writing
☐	☐	Three year total cost of ownership projection, not just a starting quote
☐	☐	Clear data export terms in case you ever need to leave the platform
☐	☐	A product roadmap that shows ongoing investment in the platform

Conclusion

The goal of this guide isn't to steer you toward any single vendor. It's to make sure that whoever you're evaluating, you're asking the questions that actually predict whether an implementation goes smoothly and whether the system holds up two or three years in, not just whether the demo looked good. A rushed decision here tends to cost far more than the extra few weeks it takes to evaluate properly.

See how Symphony holds up against this framework. Schedule a Demo.

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