



## 6 Steps for a Seamless Email Management System Implementation

Use this checklist to see best practices for implementing an email management system (EMS) from start to finish.

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## 1 | Determine Your Key Stakeholders

To ensure the success of your EMS, involve those who will utilize the tool most often during the selection process.

- Identify key departments, ranging from IT to assistants, and choose 1-2 members from each to help with the selection process.
  - Communicate the main objectives for bringing on an EMS (e.g. time savings, better organization).
  - Provide a step-by-step outline of technical and non-technical requirements with deadlines for choosing and implementing a new system.
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## 2 | Focus on Efficiency

When making a change, it's critical to demonstrate how it will benefit those who are experiencing it.

- Within individual departments, evaluate core processes and how the technology will help or hinder them.
  - Clearly explain to department representatives what benefits they can expect from the solution.
  - If employees are apprehensive, be sure to point out benefits and workflows that will impact the department in positive ways.
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## 3 | Communicate Changes Early

Once an EMS is selected it's time to implement. Be aware that this change can be jarring to someone's well-established process.

- Schedule a lunch and learn to open up the conversation with the team.
- Be transparent. Don't ignore the challenges, but explain how pros will outweigh the cons.

## 4 | Maximize Your Training Sessions

Ultimately, the success of your EMS depends on adoption by the entire team. Take these steps to get your team trained and running quickly.

- Schedule high-level team meetings to provide overall big picture and basic instructions.
  - Schedule a subsequent user-focused training to walk individuals through the specifics of their new system.
  - Create a video training to use for deeper learning after basics are covered.
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## 5 | Assign Superusers

Formal training sessions aren't the only way to promote the new technology and its use in the office.

- Pinpoint teammates who have shown ability to maximize technology use and rely on them as internal experts.
  - Rely on super-users as a place for your team to get support with potential roadblocks.
  - Ask superusers for continual feedback to gauge success of overall EMS implementation.
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## 6 | Keep Optimizing

Implementation of new technology isn't a 'set it and forget it' type thing. It's common to experience growing pains or bumps in the road as everyone adjusts to the change.

- Don't assume everyone is on board. Monitor adoption and seek out those resisting to learn more.
  - Host a follow-up training. Keep it quick and informal but give users a chance to discuss the changes.
  - Customize based on needs. Once you are using the new technology, you'll have a clearer roadmap of exactly what's needed.
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Regardless of how well you plan a new technology implementation, you're sure to have questions. When you work with [NetDocuments](#), you can rest easy knowing that you have access to experts who will offer your team complete support for all phases of implementation and transition.

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