

**DOCutivity
ANALYSIS**



COMPANY NAME

ADDRESS

CITY

STATE

ZIP

PROVINCE (n/a)

POSTAL CODE (n/a)

① EXECUTIVE LEVEL STRATEGIC DIRECTION

NAME

PHONE

FAX

EMAIL

What are your corporate goals and objectives?

What challenges are you faced with?

What trends and changes have impacted your organization?

What goals have you established with respect to enterprise document management?

What initiatives are planned to reduce cost and raise productivity?

Describe for me the selection process of a strategic business partner?

If we can help you achieve your key objectives, what priority would this have?

② DEPARTMENT MANAGER: FUNCTIONS, TASKS, DOCUMENTS, DOCUMENT LIFE CYCLE

NAME

PHONE

FAX

EMAIL

What are your department goals and objectives?

What are some of your challenges?

If we can help you achieve your department objectives, what priority would this have?

What are the **Primary Functions** that take place within your department?

F1	F2	F3	F4	F5

How many **People** are involved in each function?

F1	F2	F3	F4	F5

What **Tasks** support each of these functions?

F1	F2	F3	F4	F5

What is the **Primary Document** for each of these tasks? (*obtain samples*)

F1	F2	F3	F4	F5

What is the **Life Cycle (Document Flow)** for each of these documents?

F1	F2	F3	F4	F5

What improvements do you envision for these processes?

How would improving your document management processes help your department?

Tell me the budget process you go through for capital expenditures?

How would you rate the reliability of your existing equipment?

When you experience service problems, how long does it take for the equipment to be functional?

How does the downtime impact your department?

Additional Notes