



## Building Your Cloud Ecosystem

A cloud ecosystem can be defined as a group of applications that complement each other in order to improve workflow efficiency. Typically, a company will begin building a cloud ecosystem off a content management system. The goal is to keep as much content in a single location as possible vs. having documents or other pertinent information stored in several locations.

Most companies today have content stored in at least 3 locations which can include:

- Local shared drive
- Cloud Content Management systems
- Paper files
- USB/External drives
- Email
- Desk drawers
- Home computers
- Mobile devices
- Multiple iterations of the above

It is very easy to lose control of content, lose access to content, or lose content entirely in this scenario. The goal of building a cloud ecosystem is to try to funnel as much of this content into a primary cloud content management system so everyone that needs access to it can have access from any device in any location.

After reading our knowledge piece “Tips for Selecting a Cloud Content Management System” and successfully acquiring a new system, it will be time to start looking at how to expand your cloud footprint and build an ecosystem. The most commonly used tools include eFaxing, eSignatures, email management, office productivity suites, pdf editing tools, and mobile applications (photos/scanning/documents/notes). The main concept is to find the types of content you and your team use most frequently. Then, search for ways to allow for that tool to integrate directly with your cloud system so efficiency increases, and lost or inaccessible documents occur with less frequency.



## Building Your Cloud Ecosystem

### **eSignature:**

Great efficiency gains and paper reduction can be achieved with an eSignature tool like docusign, hellosign, or adobesign. Contracts and various written agreements account for a significant portion of many B2B and B2C paper clutter. Something important to look for in an eSignature tool is for a clean 2-way integration. This is where you can send a document out for signature from your cloud content management system, and once signed, the signed copy is automatically placed back in your cloud content management system. This drastically reduces the chances of documents being lost or separated from the core of your content. Remember, a key theme is to make sure your documents always come back to one location vs. contributing to content sprawl.

Also, make sure there is a mobile offering of the digital signature tool. It is important to be as easy as possible for your clients or vendors to be able to sign your documents from any device. Most eSignature tools allow for testing of their software on a trial in advance of purchase.

### **eFaxing:**

One way to bridge the gap between older technology and a new content management system is to put in place an eFaxing tool. These tools simply require that a fax line is set through their service which will allow any incoming faxes to go directly into the cloud content system. Further, these tools allow designation of a folder for the faxes to arrive in which can be accessed by as many or few people as needed. Frequently, office managers will distribute faxes internally with one click of a mouse. These processes drastically reduce paper and ink burden, and allow end users to receive faxes from any location, typically with keyword searchability as well.

Make sure to find a solution that allows for sending faxes to a recipient from digital documents stored in the CCM. Paper jams are gone, a streamlined digital workflow is in! Lastly, be sure the product you select also has a mobile offering that can send faxes via photo using your phone's camera, as well as a clean integration from the CCM mobile app to send existing digital documents as faxes.



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### **eMail Management:**

Some emerging technology allows for various email efficiency tools that integrate and sync email with a cloud content management system. Simply set up the software, use email as normal per your standard email provider, and the technology automatically runs in the background copying and organizing your email communication to your CCM.

Many legal, accounting, and insurance firms find this type of technology very useful as they frequently need a quick and efficient way to search, share, and/or store communication with clients. This technology works well for any organization that has a need for keyword searchable, secure copies of email. Further, the tools can also automatically place any outgoing or incoming email attachments in your CCM and replace them with more secure shared links. The concept is to keep as much content, including email communication, in one single location.

### **Office Productivity Suites:**

The most common productivity suite is Microsoft office, however there are many more out there through companies like google and others. Try to find a cloud content management system that integrates with whatever primary office suite your staff use. There are integrations that allow for a user to directly edit documents from the cloud/web browser, as well as save directly to the cloud from the desktop. Imagine opening a word document on your desktop and saving it straight to your CCM vs. having to saving it to your desktop then upload it to your content system. It's much more efficient to utilize an integration that allows for saving a document directly to the folder of your choice in your content management system. This will also help prevent documents from being saved on users' hard drives and outside your sanctioned cloud. Typically, there should be a mobile offering to allow for basic editing of these documents on the mobile device of your choice.

### **PDF Editing:**

These tools are not used as commonly used as office tools or signature tools, however can be important. If a company has a need to edit PDFs or work inside adobe files, be sure to keep an eye out for products that will allow for this to happen. It is important that they either sync directly with your content management system, or at least allow you to edit from the browser. If modifying PDFs and adobe files is important to your workflow, find a cloud that integrates with that system, it will save considerable amounts of time.



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### Mobile Applications:

A huge efficiency and security gain businesses obtain from cloud adoption is the ability to access, work on, and collaborate on content from any location. Frequently, this means using mobile devices like smart phones or tablets. When researching any of the above tools, be sure to ask or research if they have a mobile offering that works with the type of smart phone or tablet you use, and also be sure to find out if the mobile app integrates with your content management mobile app so that no content is left stranded on your tablet or phone.

There are other tools that are strictly designed to be productivity tools that integrate with cloud content systems in a mobile environment. Look for tools like mobile scanners- something that can use your device's camera to scan and convert images of receipts or documents to a pdf or jpeg that can sometimes even be edited right then and there. These often have the ability to render the document in the image keyword searchable. If that is a need, ask if the product can OCR (optical character recognition) documents.

One final important mobile offerings that is used very frequently are note taking tools. It is important to get away from legal pads or sticky notes and move to a digital and mobile environment. These tools have the ability to not only allow for written text or drawn pictures like a note pad, but can incorporate voice memos, pictures, and even video into your notes. This can be extremely vital for field sales reps or field consultants who need to be able to sync their written notes with a visual or audible aid. When these tools are deployed properly, a field rep can be taking notes on one side of the planet while the team supporting the field person has almost real time access to what is happening. That action is simply not possible with a note pad and pen. As always, ensure the note taking application can sync with your cloud content system to enhance the power of the tool, and keep ALL content in one single location.

For additional assistance on how to select or map your organization's cloud ecosystem, contact us at [info@dashdata.com](mailto:info@dashdata.com) or [844-746-3274 \(844-7-GO-DASH\)](tel:844-746-3274)

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