

Document Management

Helping clients implement digital transformation



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by: Brent Hoskins, Office Technology Magazine

Today, office technology dealerships are striving to become trusted advisors to their customers, aiming to become single-source providers of technology and solutions for the workplace. For many, in light of declining page volumes, this includes cloud and on-premise document management, helping customers with digital transformation. Along with such products and services as VoIP and managed IT services, dealers are seeing document management as a means to take their dealerships to new heights.

If you have not pursued this opportunity as a source of diversification in your dealership, is it time to take another look? Following are brief profiles of three BTA member dealerships focused on their experiences with document management. Perhaps the insight they share will be of help to you as you consider the opportunity as well.

Copiers Northwest

Document management is not a new offering at Copiers Northwest, a Canon, HP and Sharp dealership based in Seattle, Washington. However, it did present a “pandemic silver lining” as the demand for remote access to company documents began to increase in 2020 with the substantial rise in remote workers. That led to the recent addition of Square 9 Softworks to the dealership’s lineup, joining the existing Laserfiche offering.

“It is very user friendly and offers great ease of use,” says Gregg Petrie, president of Copiers Northwest. “If you are looking for a solution that works well for people working at home as well as in their office environments, a cloud-based solution like Square 9 offers a lot of advantages.”

While the dealership has been successful with Square 9, “it’s going to be even more successful as we uncover more of our clients who need this solution,” Petrie says. “All of our approximately 45 sales reps have been trained as generalists by Square 9.”

In the early 2000s, Copiers Northwest established its



Integrated Solutions Group, now focused on cost recovery, document management, intelligent data capture and workflow integration. The group offers presales specialists as well as a post-sales implementation team. “The generalist prospects and qualifies an opportunity, and then brings in a specialist in the middle stages of the sales cycle,” Petrie says. “However, the generalist remains involved until the close of the opportunity.”

Petrie says he expects the increased demand for document management solutions, driven by the rise of the remote workforce, to continue. “I think small and medium-sized companies were caught off guard [by the pandemic]; they won’t be going forward,” he says. “It will probably be top of mind for IT and CIOs for years to come, making sure that workers can function in home-office environments as if they are in a company’s office.”

With Copiers Northwest’s years of experience in selling document management, Petrie shares some “lessons learned” with his fellow dealers who may only now be pursuing the opportunity. “Start small,” he advises. “Concentrate on the specific needs within a company, such as accounts payable, accounts receivable, HR — those kinds of departments. Don’t go in to get an entire company switched over to a document management solution. Do it departmentally. If you do a good job with the first phase, it often leads to a second phase with more departments.”

Petrie also emphasizes the importance of having at least one specialist for presales and post-sales. “If you are not going to hire a specialist, don’t waste your time on it,” he says. “Moving forward with only a generalist can get you into trouble. If that person doesn’t know what he or she is doing, you are going to be doing your customers and your dealership a disservice.”

It is also important to ensure the dealership has a “clear, concise scope-of-work document” in every document management implementation, Petrie advises. “In addition, make sure you have a document for the customer to sign off that you

did what you said you would do in the scope of work — that the system is fully implemented and up and going.”

Finally, says Petrie, dealers should expect the selling process for document management to be longer than it is with imaging devices. “With a segment 3 copier, it’s probably a 30- to 60-day sales cycle,” he says. “With software solutions, you are probably averaging six months. It could be less than that, especially if you start with a department.”

While implementing a document management solution makes customer relationships “stickier” and “definitely builds more customer loyalty,” the nature of the payoff at Copiers Northwest may not be what some expect. “Although our Integrated Solutions Group doesn’t make money on an annual basis, we believe it increases our equipment profitability,” Petrie says, noting that it eliminates having to sell to the customer on price. “That’s why we offer these types of solutions. We believe our equipment margins are higher than they would be if we didn’t have an Integrated Solutions Group.”

RJ Young

There is a good reason why document management is an ideal offering at RJ Young, an office technology solutions provider with roots in copiers and printers with locations throughout the Southeast. It fits perfectly, says COO AJ Baggott, with the company’s focus on “providing the ‘modern office’ — a comprehensive technology solution — to all of our customers.”

Since RJ Young was founded in 1955, there has been a constant desire “to be at the forefront of what our customers need,” Baggott says. “We’re constantly looking to evolve in order to provide solutions for those needs.”

Today, a primary need among RJ Young’s customers is clear. “One of the most overused phrases in America right now is ‘digital transformation,’ but it is a reality for everyone,” Baggott says. “We all have ‘COVID PTSD’ and we know we can’t get caught in another situation where it is difficult to conduct business. It is certainly a very viable talk track for us to ask customers: ‘What happens the next time you have to send everybody home to work remotely?’ Or, perhaps for some customers, the message is: ‘Going forward, your employees are going to work from home one day a week and you want to make sure they have the same level of productivity at home as they do in the office.’”

For RJ Young and its customers, the answer lies in DocuWare. About 18 months ago, the company began looking at

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the document management solution as a “centerpiece” offering, Baggott says. “It is a solid, comprehensive solution that is not industry specific,” he says. “We want to make sure we are selling the best solution. That’s how we settled on DocuWare. It is the best fit for the vast majority of our customers.”

RJ Young’s focus on DocuWare during the past 18 months reflects just how

strongly it supports the product. “We actually went out and offered conversions to people who were on a different product that we sold them previously, doing so at a significantly discounted price in terms of the implementation fees,” Baggott says. “We truly feel like it is a better solution for our customer base, so that certainly helped us gain traction with our customers and our sales teams.”

RJ Young is making strides with the DocuWare solution with the help of its document management specialists working alongside its sales reps. “Typically, an account executive will identify an opportunity and then bring in the specialist,” Baggott says. “They work together; we are big on taking a team-selling approach. That gives customers some peace of mind, knowing that they have a team dedicated to them.”

Often, Baggott adds, the DocuWare sale and implementation is (or becomes) part of a bigger sale. “By having the account executive involved, he or she can see other opportunities in the customer location and can speak to those as well,” he says. “Recently, we were at a customer site for a document management opportunity and that led to the sale of a phone system. They were having trouble with their existing system and we were there to have that conversation.”

While document management results in welcome pull-through sales, the software solution itself has proven to be particularly lucrative at RJ Young. “Document management was at around \$4 million for us last year,” Baggott says. “I think it is going to absolutely remain one of the fastest growing segments of our business, doubling year over year. I don’t think that is outside the realm of being possible or reasonable at this point.”

For other dealers currently eyeing document management as a new revenue stream, Baggott offers some words of advice. “This is a different sales cycle than your traditional hardware sale,” he explains. “It’s a more sophisticated sale. It’s not, ‘Here’s a product, buy it.’ You have to go in and evaluate the workflows and needs of the customer and understand their business processes. That leads to a longer sales cycle.”

Document management is not something a company can “dabble in,” Baggott says. “You have to understand that it’s going to be time consuming and that you have to have some resources dedicated specifically to it,” he says. “You are better off to avoid any half-hearted attempt. That would cause you more heartache than it would be of benefit for your customer.”

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— Derek Mills
Tri-Copy Office Equipment

turned into an active part of their business instead of being locked on paper, then we can have that conversation and very clearly explain to them how we can help.”

Mills shares a novel sales pitch. “The ultimate goal is for you to be able to more or less Google your documents, just like you Google now, so that everything that is locked on paper will be visible on your desktop,” he

Tri-Copy Office Equipment

Derek and Sherrie Mills co-founded their dealership, Tri-Copy Office Equipment in Fayetteville, Georgia, in 1999. “The first month, we sold one machine,” says Derek Mills, who serves as president. “I clearly remember the excitement over that machine and thinking, ‘That tells me everything is working. If we can sell one, we can sell 1,000 more, one at a time.’”

Today, the Konica Minolta, KIP and Toshiba dealership has broadened its offerings to include managed IT services, phone systems and, more recently, document management, in partnership with Sentry File. “Once we implemented one Sentry File system, it took me back to 1999,” Mills says. “We’ve installed one system; now we can install 1,000 more, one at a time.”

The entry into document management for Tri-Copy began two years ago following a conversation between Mills and Sentry File’s Dan Watson at a BTA event. Mills’ goal was to find a “relevant, cutting-edge solution” that would meet the needs of the market. “We found that partner in Sentry File,” he says, emphasizing the importance of Watson’s ongoing support. “There is a trust there — a trust that transfers to Sentry File.”

Ultimately, Sentry File provided comprehensive training to the dealership’s sales team and a technician. “Dan was patient throughout all of that and was very helpful,” Mills says. “We are now fully committed to this as a part of our sales approach.”

Tri-Copy’s talk track now includes a simple question, “Do you have a document management software system?” Mills says. “If the answer is ‘no,’ we say, ‘You may not realize it, but you have a challenge within your company,’” he explains. “Because we know the Sentry File product, with confidence, we explain how we can help them address that challenge.”

Essentially every business that has a file cabinet is a prospect for document management, Mills says. “That’s what is exciting about it,” he says. “If they want to have their files

explains. “There are a few steps between now and when we are able to get you there, but this is a process that we can get started for you as part of the digital transformation that you need to make as your business evolves.”

In any dialog about document management, Tri-Copy sales reps are deliberate in how they refer to its implementation, Mills says. “We make sure that our reps understand that this is a ‘project,’” he says. “Selling a copier, that’s an installation. Document management software is treated as a project, a scope of work.” Following the sale, the project is transferred to Tri-Copy’s project coordinator and Sentry File to manage the implementation. “The sales rep manages the paperwork as well as the upfront relationship and expectations,” he says. “After the implementation, the rep returns to manage the expectations, making sure they were not only met, but exceeded.”

Because Tri-Copy primarily sells on-premise document management, the implementation provides for additional pull-through sales, Mills says. “There’s the server, typically a backup NAS device and building an off-site, cloud-based backup,” he says, noting that the pull-through is often not limited to the scope of the project. He also notes that most document management clients are new to Tri-Copy. “We often find the client sees that we have MFPs and phone systems and asks, ‘You guys do that, too?’”

At that point, ‘we’re back in the commodity business, but it’s at a better margin because of the client’s desire to have a single-source provider,’ Mills says. “Actually, I look to make sure that document management has this extra pull-through potential with the other offerings we have, knowing the client will feel very confident in our competency to provide them a complete solution.” ■

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