

DMS Implementation Checklist

Ten questions to answer before you sign any DMS contract

A practical checklist distilled from twelve years of enterprise document management projects across the DACH region. Use it to scope, plan and avoid the five most common ways a DMS rollout goes off the rails. Free, no gate — and we'll email you the next checklist when it's published.

10 QUESTIONS · 12 YEARS · DACH ENTERPRISE

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What you should clarify before kickoff

01

Scope: which document types and which departments?

List every document class you need under DMS control — incoming invoices, contracts, HR records, project documentation, technical drawings. Decide what stays out of scope for phase one.

02

Map the existing process before designing the new one

Walk through the current life cycle of each document type with the team that actually handles them. Sticky-notes on a wall beats slide decks.

03

Single source of truth: where does master data live?

If a customer record exists in the ERP, it does not also live in the DMS. Define which system owns which entity and synchronize one-way wherever possible.

04

Compliance audit: GDPR, retention, audit trail

List the legal retention periods per document class, define deletion workflows, and confirm that audit-trail entries cover create, read, update, delete and access events.

05

Integration list with priorities

Which systems must read or write to the DMS on day one? Common items: ERP (SAP, BMD, Business Central), email, scanner / OCR, mobile, Active Directory. Mark each as MVP, phase two or out of scope.

06

Migration strategy for historical documents

Decide whether to migrate the archive in bulk, on demand, or not at all. Plan a parallel-run period during which both old and new systems are authoritative.

07

User training and change management plan

Pick power users in each department, train them first, give them a clear role during rollout. Generic training does not work for document management because every team has unique workflows.

08

Success metrics agreed with leadership before kickoff

Define and baseline cycle time, search time, error rate and cost-per-document upfront. A DMS without measured outcomes drifts into a glorified file server.

09

Phase plan: MVP first, then iterate

Resist the temptation to launch all departments at once. Pick one process, one ERP integration, one document class — get to production in 8-12 weeks, then expand.

10

Vendor / partner selection criteria

References in your industry, GDPR-compliant data residency, transparent licensing model, an actual implementation track record (not just sales decks). Demand a paid pilot.

NEXT STEP

Want this checklist applied to your specific environment?

Book a free thirty-minute scoping call and we'll walk through these ten points against your existing systems, document types and team structure.

BOOK A FREE 30-MINUTE SCOPING CALL

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