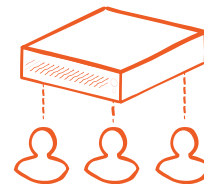


# 9 Must-Ask Questions for Evaluating Document Productivity Software

With the right tools, your users can achieve exponential productivity increases. Use this checklist to guide you toward the best option for your business.

## ☐ What document challenges do your users face?

To keep the evaluation process on track, arm yourself with a clear understanding of how and why your users could benefit from a document solution. A compelling business case will simplify the buying cycle as you identify the right vendors and involve more people in the purchase decision.



## ☐ Does it scale?

The ability to standardize is a huge benefit from both an asset management and productivity perspective. As a result, it's important to find an affordable solution that can both scale to as many users as necessary, and add daily value to multiple user groups with varying needs.



## ☐ Is it easy to use?

If user adoption is a key metric, the solution's ease of use is one of the most important things to evaluate. An intuitive design will enable users to pick up the tool quickly and with less training, encouraging fast adoption and optimal usage across your base.



## ☐ Can we try before we buy?

If the vendor offers a free trial, take it as an opportunity to get a baseline understanding of features and functionality. If it seems like a fit, ask about expanding the trial to a test group so you can ensure the solution meets the needs of the various users segments in your organization.



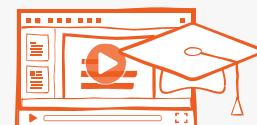
## ☐ What is the implementation process like?

This is another area where vendor flexibility is paramount. Look for a vendor that will work with your rollout plans. Can they help you get up and running ASAP if your turnaround time is tight? Or, if you're doing more of a phased rollout, will they be supportive of your long-tail approach?



## ☐ What types of training resources are available?

User training can be another burden for IT, so ask vendors to outline the types of resources that will be available to you and your users during onboarding. Some are far more comprehensive than others, which should help you hone your search.



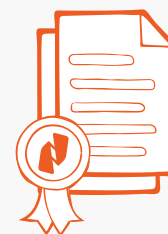
## ☐ What does customer support consist of?

Good software vendors will have service level agreements that outline commitments to response times, issue escalation, and issue resolution. Some will even give you the option of routing user support requests to your own IT helpdesk or directly to the vendor's support experts.



## ☐ What are the licensing options?

Certain vendors are notorious for their complicated and restrictive licensing, which can easily transform into a big problem. Seek out a partner with flexible licensing options that can adapt to the unique needs of your organization—they do exist, and they'll save you time, frustration, and, likely, money.



## ☐ Is compliance difficult?

Aggressive compliance audits by large software companies can involve everything from excessive penalty fees to costly contract restructuring. However, some vendors take the opposite approach and allow customers to consume licenses on an as-needed basis with regular true-ups. These partners are the ones to trust.



Optimizing document productivity can be a game-changer for your organization, and choosing the right partner is a critical first step.

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