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HOW TO BUILD A BUSINESS CASE FOR EDMS CLOUD MIGRATION

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THE STATE OF ENGINEERING DOCUMENT MANAGEMENT TODAY

The volume, complexity and velocity of engineering documentation is rapidly expanding. From CAD files and technical drawings to change logs and compliance records, your organization is facing an exponential information burden. And the data proves it. American employees, on average, are spending 25% of their workweek[1] simply looking for documents and information.

Stanmore Resources,[2] for example, experienced challenges after rapid company growth resulted in a huge increase in the amount of engineering assets and documents that needed to be managed. As their business grew it uncovered critical challenges in Stanmore Resources' engineering document management practices.

Traditional, on-premises EDMS platforms, once a backbone of document control, are increasingly revealing limitations. Siloed access, outdated user interfaces (UI), costly hardware maintenance and security vulnerabilities make it harder for engineering teams to move quickly, meet regulatory requirements and collaborate across all teams and locations needed.

With a cloud-based engineering document management system (EDMS), you can reshape how your engineering firm operates. These solutions provide scalable infrastructure, built-in version control, seamless integrations and secure, role-based access from anywhere. As the pressure mounts to innovate, cut costs and streamline operations, the shift to a cloud EDMS is no longer a matter of "if", but "when."

In this guide, we look at the growing challenges in legacy EDMS platforms, what's driving change and key benefits and outcomes you can achieve with a cloud-based system. You will also gain insight on how to make the business case for migrating to a cloud-native EDMS and why it's a strategic imperative for future-ready engineering.

[1]https://get.glean.com/rs/626-JWX-444/images/2022_Hybrid-workplace-habits-hangups_Glean-report.pdf

[2]https://www.accruent.com/resources/case-studies/stanmore-resources-edm-transformation-redeye

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3 GROWING CHALLENGES WITH LEGACY EDMS

Your engineering team operates in high-stakes environments, so speed, precision and collaboration are non-negotiable. But staying anchored in an on-premises EDMS platform when you don't need to can bring you more friction than business agility.

For Stanmore Resources, their legacy system was underdeveloped and underutilized, meaning teams struggled to keep up. From approval processes for statutory compliance to project workflows to metadata systems, their EDMS was not robust enough to support operation as they grew.

When thinking about your own organization, the following are three critical challenges you've likely faced with a legacy, on-premises EDMS.

1. Technical Debt and Maintenance Overhead

When it comes to legacy systems, upkeep is constant. From patching to hardware refreshes to custom integrations, IT bandwidth and budgets are constantly strained. On top of this, legacy platforms often lack vendor support, creating technical debt[3] that compounds over time and diverts focus from innovation.

2. Version Control Failures and Safety Risks

Out-of-sync file versions, uncontrolled document duplication and limited audit trails can be common constraints with legacy systems. Not only does this increase the likelihood of errors that can seriously disrupt your engineering workflows, but your team is also exposed to risks around time-consuming and costly reworks, noncompliance issues and failures that may affect safety requirements.

3. Bottlenecks and Operational Delays

Legacy systems often require extensive training to understand how they work and only a few personnel are trained in it fully. Chances are you may be experiencing limitations with your own on-premises legacy system as a result. This means every access request, update or workflow modification can become a bottleneck. Centralized expertise slows down your ability to make informed decisions quickly and makes cross-functional collaboration even harder.

[3]https://en.wikipedia.org/wiki/Technical_debt

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3 STRATEGIC DRIVERS FOR EDMS CHANGE

The shift to cloud-native EDMS isn't solely a move to simply upgrade technology. It's a strategic approach to enabling your engineering organization to be more resilient as you grow and scale.

Here are three strategic factors accelerating this transition:

1. **Decentralized Teams and Remote Work:** All stakeholders need secure access to documents in real-time, no matter where they are. With a cloud native EDMS you can make sure that version control and edit trails align while keeping collaboration secure, without needing VPNs or physical infrastructure.
2. **Standardization after M&A and Growth:** As companies grow through mergers, acquisition or expansion into new markets, document sprawl is inevitable. Cloud-based platforms offer a scalable foundation for standardizing processes and unifying teams around documentation protocols.
3. **Alignment with Digital-First Initiatives:** Investment in digital twins, artificial intelligence (AI) and machine learning (ML) design tools and Industry 4.0 technologies[4] need document systems that can integrate, evolve and support automation. On-premises systems often fail to meet these agility requirements.

[4]https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-are-industry-4-0-the-fourth-industrial-revolution-and-4ir

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KEY OUTCOMES AND MEASURABLE BENEFITS WITH A CLOUD EDMS

Migrating to a cloud-based EDMS can unlock several advantages across your teams, budgets and workflows. Key outcomes include:

- **Achieve New Gains in Operational Efficiency:** Reduce search time, accelerate review cycles and streamline workflows with automated version control and centralized access. Net-net? Teams spend more time executing, less time managing files.
- **Save Money and Reduce IT Overhead:** Eliminate infrastructure costs, reduce software maintenance spend and free up IT resources. Most organizations see a significant reduction in total cost of ownership (TCO) within 12–18 months.
- **Improve Safety and Compliance:** Ensure audit readiness with built-in access controls, version history and standardized documentation practices. Reduce the risk of human error in safety-critical environments.
- **Make Your Organization Scalable and Future Proof:** Onboard new users, integrate with cloud-based design and ERP tools and scale globally without the need to re-architect. Cloud platforms can evolve with your business and technical needs.

FROM COMPLEXITY TO CLARITY: STANMORE RESOURCES' JOURNEY TO STREAMLINED EDM

13.8MT	40%	$2.396M
SALEBLE PRODUCTION	CUSTOMERS BASED IN JKT REGION	REVENUE 2024

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HOW TO EVALUATE CLOUD EDMS FOR YOUR ORGANIZATION

Considering a migration to the cloud is your first step, but the real value comes from choosing the right platform. The right solution will not only meet your business needs, but also expand your capabilities across compliance, user experience and long-term cost savings.

3 QUESTIONS TO ASK WHEN CHOOSING A CLOUD EDMS PLATFORM

As you review available cloud EDMS solutions here are three critical questions to consider.

Is the system secure and compliant?

You should always look for providers with enterprise-grade security features such as encryption at rest and in transit, role-based access controls, audit trails and compliance with industry standards (e.g., ISO 27001[5], SOC 2[6], FDA 21 CFR Part 11[7]). When it comes to risk mitigation you also want your cloud EDMS to have built-in data residency and backup features.

What will the user experience and platform adoption be like?

The platform you choose should be intuitive for both technical and non-technical users. Anyone who needs to use it should be able to do so easily. Features like drag-and-drop upload, intelligent search, mobile access and real-time collaboration help promote adoption and reduce training costs.

What can I expect when it comes to total cost of ownership (TCO) and return on investment (ROI)?

Beyond licensing, think about infrastructure, maintenance, support and upgrade costs. Cloud EDMS platforms reduce capital expenditures, free up IT resources and offer predictable pricing. It's likely you'll see ROI within the first year because of time savings, reduced downtime and lower risk exposure.

> ***"Different operating models at each site, rapid growth and inherited challenges with the systems meant change was necessary. We needed one unified system across all sites that worked for our engineers and the business."***
>
> – Matthew Ponomarenko, Principal Reliability Engineer, Stanmore Resources

[5]https://www.iso.org/standard/27001#:~:text=%EE%80%80ISO/IEC%EE%80%81%2027001%20is%C2%A0the

[6]https://socreports.com/audit-overview/what-is-soc-2

[7]https://www.ecfr.gov/current/title-21/chapter-I/subchapter-A/part-11

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CLOUD AND ON-PREMISES EDMS: A SIDE-BY-SIDE COMPARISON

FEATURE/CRITERIA	CLOUD EDMS	ON-PREMISES EDMS
Deployment Times	In as little as a few weeks (faster onboarding)	Months (complex setup)
Initial Cost	Low (subscription-based)	High (hardware and licenses)
Scalability	Elastic, instant scalability	Limited by physical infrastructure
Maintenance and Upgrades	Automatic, vendor-managed	Manual, IT-managed
Security	Enterprise-grade, continuously updated	Dependent on in-house IT capabilities
Compliance Features	Built-in certifications and logging	Often requires customization
User Access	Anywhere on any device	Location-dependent, VPN often required
IT Overhead	Minimal	High
TCO	Lower over time	Higher due to ongoing maintenance
ROI	On average, within 6-12 months	2+ years or more

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7 STEPS TO BUILD YOUR BUSINESS CASE FOR CLOUD EDMS MIGRATION

Modernizing your EDMS is crucial to broader transformation efforts. To make a solid business case and get support from engineering, compliance, operations and executive leadership, frame the business case around risk reduction, cost savings and operational agility. Use this seven-step guide to help build your case.

1. **Clearly Define the Problem:** Assess your current on-premises EDMS and document specific limitations. For example, downtime, access issues, version errors, IT burden and hidden costs that arose over time. Quantify the risks associated with these obstacles.

2. **Identify Strategic Alignment:** Connect your proposal to organizational priorities like digital transformation, remote collaboration, M&A integration or regulatory compliance readiness. You want to show how a cloud EDMS supports these goals.

3. **Engage Stakeholders Early:** Involve key stakeholders across engineering, IT, compliance and operations. Their input validates your case and shows that alignment with broader business needs has already been considered.

4. **Work with Subject Matter Experts:** Consult EDMS vendors, IT architects and compliance specialists to validate your technical assumptions and identify solutions that will be the best fit for your industry and use case.

5. **Conduct a Cost-Benefit Analysis:** Compare TCO over a three to five- year period for all solution options you consider. Include infrastructure savings, how much IT strain will be reduced, ways to avoid downtime and productivity gains.

6. **Craft a Migration Roadmap:** Outline the key phases that will be involved including discovery, vendor selection, data prep, implementation and user onboarding. Use this step to address how you'll get ahead of risks and any plans you have for change management to build credibility with leadership.

7. **Package the Case for Approval:** Develop a clear summary with defined ROI, timelines and measurable outcomes. This is what executive leadership will likely be most tuned into, so position the migration as a long-term business enabler and not just a tech upgrade.

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STEP INTO THE FUTURE OF ENGINEERING DATA MANAGEMENT

Engineering data is complex and interconnected. As AI-driven design, digital twins and smart infrastructure continue to gain traction, being able to scale document management and handle that process with precision and speed will be a differentiator.

Cloud-based EDMS platforms have become foundational to engineering operations, reducing risk, accelerating innovation and uncovering key insights from a vast array of assets. The tools are there to be used and the benefits are quantifiable and valuable. Now, it's time to build your business case and get your organization on board.

If you're ready to future-proof how your teams build, collaborate and deliver, **book a migration consultation session with us today.**

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