



IDT
putting paper in its place

Integration Insider

Volume 1, Issue 4



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September. The end of summer, the beginning of fall and for kids around the country September means back to school. At IDT we've decided to head back to school too. This month we invite you to get back to basics with Enterprise Content Management 101 and Corporate Compliance 101. Don't worry, there won't be a test.

If you've got a thirst for more knowledge, see the News & Events section for details on how you can meet with us in person at our CRM or Compliance seminars coming up in October.

As always, we want to know what you think! Feel free to tell us your thoughts through the [Feedback](#) link or get an answer to that burning question by submitting your inquiry to [Ask the Expert](#).

Happy Reading,
The IDT Team

Want more info about
Microsoft Business
Solutions Demo Week
Oct. 13-17? E-mail us!

Register here for our
free CRM Seminar
October 23rd
Space is limited!

Register here for our
free Compliance
Seminar October 22nd
Space is limited!



Put it to Work

Enterprise Content Management 101

You have probably heard Enterprise Content Management referred to by many names – including document imaging, document management, collaborative commerce or workflow. These are all components of the broader Enterprise Content Management market or ECM.

ECM is the electronic capture, storage, retrieval, routing and management of multiple data types – including digitized images, faxes, computer outputs and electronic data. Its basic purpose is to manage different data types and make them readily available to end users.

[Read More](#)

Corporate Compliance 101

More and more frequently, formal compliance policies and programs are mandated by government agencies and/or industries to ensure compliance with laws and regulations

regarding proper maintenance and disposition of records. Whether your company is dealing with HIPAA, Sarbanes-Oxley, the Patriot Act, DoD 50.15, new SEC legislation, or other industry specific regulations, you know that the process you go through to achieve compliance can be overwhelming.

So where do you start?

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Ask the Expert

Question: Our sales team already utilizes a well-known contact management system and it seems to work well. What do we gain by adding CRM capabilities to our sales management?

A: *This month we continue with Part II of our answer and focus on leveraging and improving a current workflow to build an awesome CRM solution.*

Workflow is a key component of an effective CRM system. Because workflow follows a **defined business process**, the process of sales is “orchestrated” automatically. Business rules and logic that were defined by management are strictly adhered to throughout the sales cycle. It takes the guess work out of forecasting/lead/opportunity/activity/task management.

So how exactly does this work?

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News & Events

Upcoming Seminar: Microsoft Customer Relationship Management - The Key to Making CRM Work

You want to manage, coordinate, and synchronize every customer 'touch point' – that's CRM. We want to show you the key to making CRM work. Join us **October 23rd** and learn how your business can be a place where:

- Your sales and marketing resources are focused squarely on the most profitable customers
- The interaction between a customer and every employee produces a qualified lead that may be nurtured into a sale

[Find Out More.](#)

Upcoming Seminar: Sarbanes-Oxley Compliance and Records Management – Public or Private... All Companies are Accountable

In today's world, organizations in every industry must protect their most critical business assets - corporate information. The demand for corporate compliance and records management is driven by factors such as recent legislation, litigation, risk management, mergers and acquisitions, globalization, security, privacy, and public and private sector access policies.

Join us October 22nd to learn about:

- Recent laws and regulations that have significantly increased the need for companies to properly manage records.
- The significant risks associated with improper record management
- Solutions for reducing your risk and for dealing with records management issues in a cost effective manner.

[Find Out More.](#)

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