



## International survey results

# THE STATE AND TRENDS OF ELECTRONIC DOCUMENT MANAGEMENT

Key priorities, challenges, and expectations of business leaders regarding document workflow automation

### Organizer:

SMART business  
Microsoft Solutions Partner  
6 out of 6 designations

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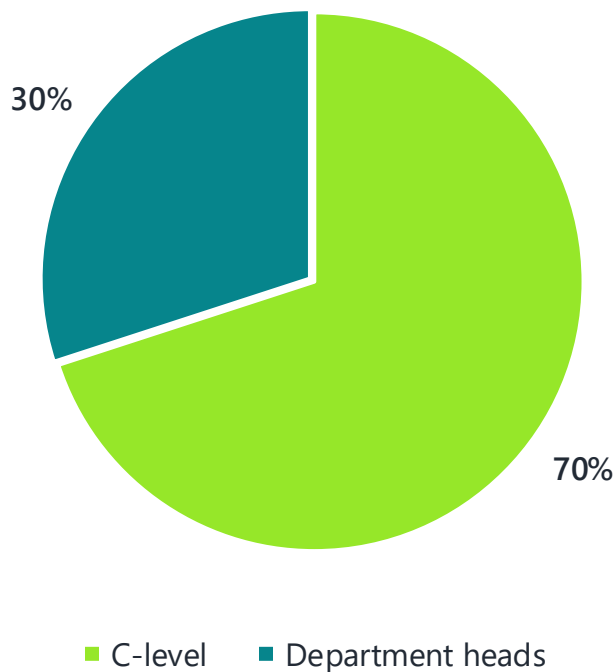
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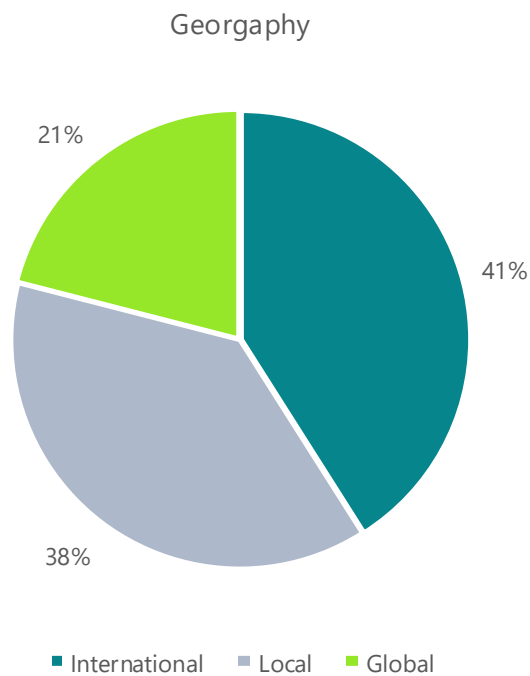
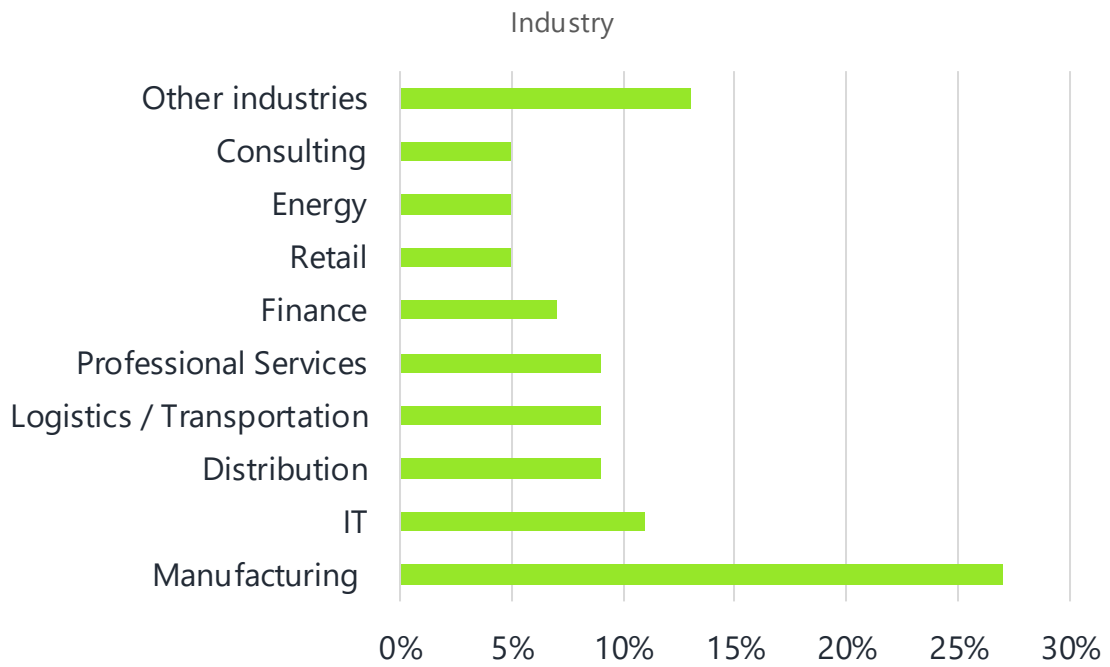
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Electronic document management has become business-critical in an environment shaped by digital transformation, globalization, and increasing demands for operational efficiency. The study conducted by SMART business in Q4 2025 was designed to identify the key priorities, challenges, and expectations of company leaders in document digitalization, as well as to gather actionable insights for the industry and share them with the professional community.

The survey included executives from more than 50 companies across multiple European countries. Participants represent mid-sized and large organizations operating in industries such as manufacturing, IT, distribution, logistics, finance, professional services, retail, and others.

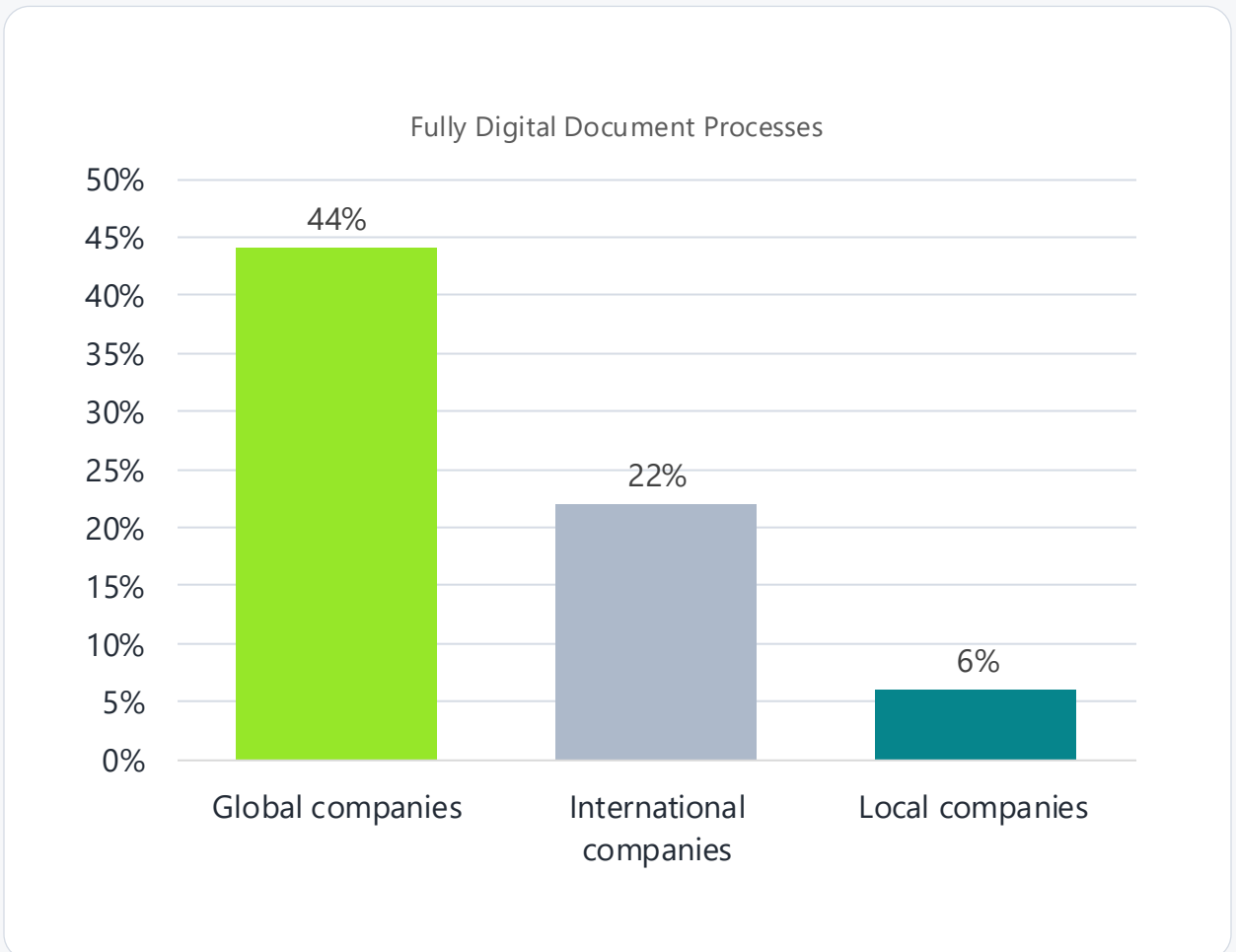
## Respondent Profile





Survey results show that a hybrid document management model (paper and electronic) still dominates, **used by 79.5% of organizations**. As of the end of 2025, 20.5% of companies have fully transitioned to digital document workflows.

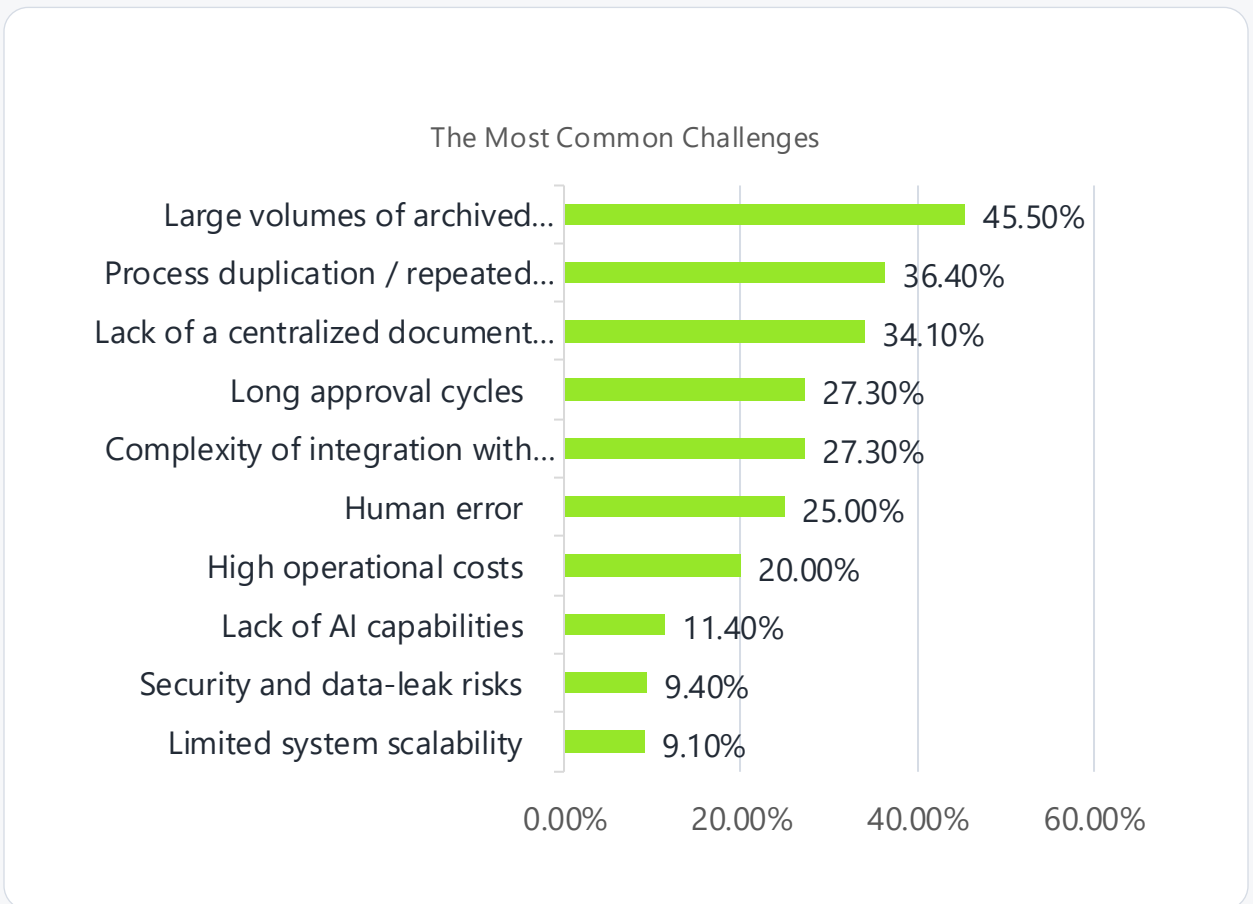
Among the three geographic business groups, global companies lead in document digitalization, with 44% operating fully digital document processes. For international companies, this figure stands at 22%, while only 6% of local companies have achieved full digital document management.



## The Most Common Challenges in Current Document Workflows

Among the key challenges in today's document workflows, large volumes of archived paper documents remain a major issue for nearly every second respondent. Process duplication and the lack of a centralized document repository were cited by one in three survey participants.

Lengthy approval cycles and complex integrations with other systems were identified as challenges by 27% of respondents, while errors caused by human factors were mentioned by one in four.



Companies operating with hybrid document workflows most frequently pointed to process duplication, long approval times, the absence of a single document repository, and integration challenges. This highlights the inherent difficulties of transitioning from paper-based processes to fully digital solutions. In contrast, organizations with fully digital document workflows primarily identified system integrations, security and data-leak risks, and high operational costs as their main challenges.

According to the study results, satisfaction with the current electronic document management system varies significantly depending on the level of process digitalization within a company. Organizations with fully digital document workflows reported an average satisfaction score of **3.67** out of 5, while companies using a hybrid approach (paper + electronic) showed a lower score of **2.97**.

An analysis of respondents' answers indicates that, to rate their current system a "5", executives at companies with hybrid document workflows most often lack:

- Ease of use and overall system usability
- Integration with ERP, CRM, and other enterprise systems
- Expanded automation capabilities

At the same time, leaders at companies with fully digital document workflows most frequently point to the need for:

- Broader use of built-in artificial intelligence capabilities
- Higher standards for security and access control
- Further automation of business processes

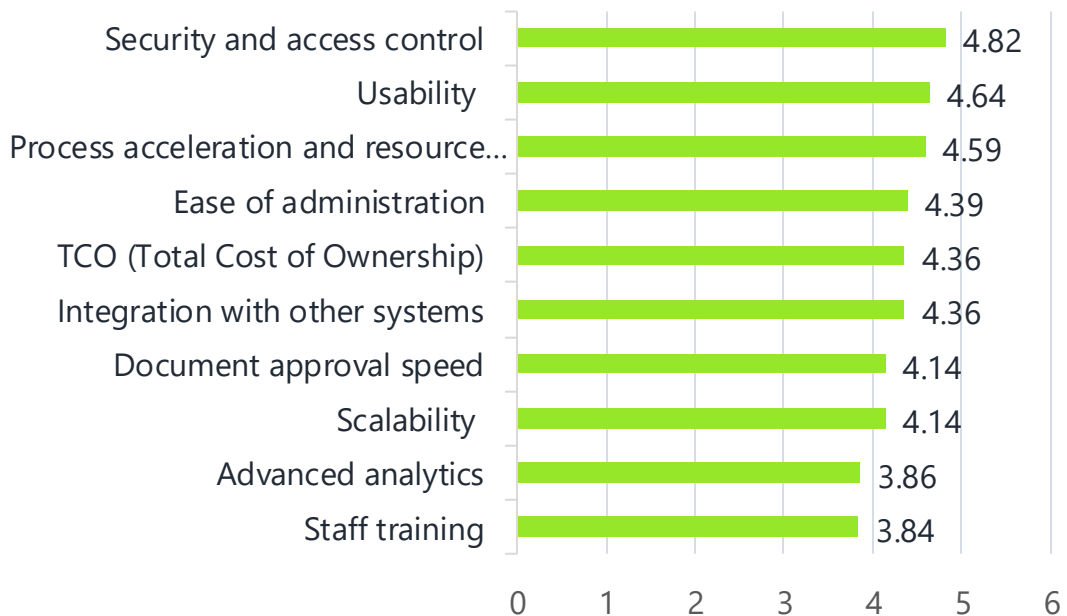
These findings suggest that companies at different stages of digital transformation have distinct priorities when it comes to developing electronic document management systems. To increase satisfaction levels, it is essential to address the specific needs of each group.

## Key Factors in Choosing an Electronic Document Management System

Respondents were asked to rate, on a five-point scale, the factors that are most important to senior executives when selecting an electronic document management (EDM) system. Across all types of organizations — global, international, and local — the following factors were identified as the most critical:

- Security and access control — **4.82**
- User-friendliness — **4.64**
- Acceleration of business processes and reduction of manual workload — **4.59**

Key Factors in Choosing an Electronic Document Management System



It is worth noting that total cost of ownership (TCO) received a particularly high rating among local businesses, scoring 4.69 out of 5. This highlights that for companies operating primarily in local markets, cost efficiency and transparency of implementation and maintenance expenses are especially important considerations.

Overall, the findings show that regardless of company size or geographic scope, the core requirements for an electronic document management system remain largely consistent. The differences lie mainly in how strongly organizations prioritize certain additional factors.

## What Most Often Prevents or Delays the Implementation of Electronic Document Management

An analysis of the survey responses shows that the most common barriers to implementing electronic document management include:

- Lack of time or resources — **29.9%**
- Uncertainty about choosing the right solution — **25.4%**
- Regulatory requirements — **16.4%**
- Limited budget — **14.9%**
- Employee resistance to change — **13.4%**

These factors indicate that organizations face both internal barriers — such as limited resources, employee resistance, and constraints on engaging external vendors — and external challenges, primarily regulatory requirements.

Smaller companies are more likely to postpone the adoption of electronic document management due to a lack of time or resources and uncertainty around solution selection. For mid-sized organizations, the main obstacles are employee resistance and unstructured or inconsistent processes, highlighting the need for a strong focus on change management.

Larger enterprises most often delay decision-making due to budget constraints and regulatory requirements.

## The Role of Electronic Document Management in Digital Transformation: Priorities and Trends

Respondents rate the importance of electronic document management (EDM) for a company's digital transformation very highly, with an average score of 4.32 out of 5. This indicates that most businesses view EDM as a key element of their digitalization strategy.

For companies with hybrid document workflow (paper + electronic), EDM is considered one of the primary tools for moving toward a more digital environment, with an average rating of 4.46. Companies with fully digital document workflows rate the role of EDM in digitalization lower, at 3.78, suggesting that for organizations that have already achieved a high level of digitalization, EDM is perceived more as a baseline standard than a transformation driver. In other words, EDM provides a foundation for digital transformation.

1. Use of artificial intelligence for document processing — **59%** of respondents consider this a key trend.
2. Automation of document approval and signing — **59%**.
3. Integration with corporate systems (ERP, CRM, etc.) — **48%**.
4. Enhanced security and access control requirements — **39%**.
5. Expansion of mobile access capabilities — **34%**.

Overall, AI-driven document processing and automation of approvals/signatures emerge as the most important trends highlighted by the majority of top management.

## Key Business Priorities for the Next Three Years

Survey results indicate that in the coming years, companies of various sizes and geographies will primarily focus on improving operational efficiency, advancing digitalization and business process automation, as well as scaling their operations, optimizing costs, and expanding into new markets.

### Improving operational efficiency stands

out as the clear top priority. This direction is most frequently cited by both global and local companies, as well as organizations with fully electronic document workflows. For these companies, efficiency is becoming the foundation for sustained growth and long-term competitiveness.

### Digitalization and automation

rank as the second most important priority, particularly for companies with hybrid document workflows and for local businesses. This reflects a strong commitment to completing the transition to fully digital processes and reducing reliance on paper-based procedures.

### Business scaling and market expansion

are more often mentioned by companies that already have a mature digital infrastructure or are planning active growth. For smaller companies, scaling represents a key driver of development, while for larger organizations, it is a way to strengthen and maintain their leadership positions.

## Conclusions

The international study conducted by SMART business in the fourth quarter of 2025 among top executives from mid-sized and large companies across Europe provides a clear picture of how businesses perceive the role of electronic document management within the broader context of digital transformation. Respondents — from local organizations to global enterprises — view electronic document management (EDM) as a foundational tool for improving operational efficiency, transparency, and the scalability of business processes.

As of the end of 2025, most companies continue to operate within a hybrid document workflow that combines paper-based and digital processes (79.5%). Only 20.5% of surveyed organizations have achieved fully digital document management. This highlights significant market potential and suggests that, for most businesses, the digital transformation of document workflows is still underway. The level of digitalization also strongly correlates with company scale: global organizations are moving to digital much faster, while local companies face a broader range of barriers and constraints.

### Business Priorities in EDM and Digitalization

Survey data confirms that executives increasingly see EDM as a core component of their digital strategy. Clear priorities include improving operational efficiency, completing the digitalization of business processes, reducing costs, scaling operations, and strengthening security maturity. For companies with hybrid workflows, electronic document management serves as a bridge to becoming fully digital organizations. Meanwhile, for companies that have already completed the transition, EDM has become a baseline standard upon which next-generation technologies are layered — such as integrations, AI, workflow automation, and advanced access control.

There is also growing interest in implementing document-oriented AI, automated approval and signing workflows, as well as integrations with ERP and CRM systems. This indicates that over the next 2–3 years, competition among companies will increasingly be driven by the speed and technological maturity of their digital processes.

### **Expectations from EDM Systems: Different Models, Different Priorities**

The survey revealed that company expectations largely depend on the current state of their document workflows.

#### **For companies with hybrid document management, the key priorities are:**

- ease of use and reducing manual work,
- integrations with ERP, CRM, and other enterprise systems,
- expanded automation capabilities.

Their goal is to eliminate gaps between paper-based and digital processes and bring document workflows into a unified digital environment.

### **Expectations from EDM Systems: Different Models, Different Priorities**

The survey revealed that company expectations largely depend on the current state of their document workflows.

### **Key Challenges in Implementing and Advancing EDM**

The study results show that the transition to electronic document management (EDM) is hindered by both internal and external factors. Internal barriers include limited time and resources, unstructured processes, employee resistance, and budget constraints. External factors involve specific regulatory requirements and security risks.

## The most common challenges in current document workflows include:

- large volumes of archived paper documents,
- duplicated processes and repeated data entry,
- lack of a centralized repository,
- complex integrations,
- lengthy approval cycles,
- errors caused by human factors.

These challenges indicate that digital maturity varies significantly across organizations, and most businesses are still in the process of overcoming the fundamental barriers to going paperless.

Electronic document management is becoming the undeniable core of digital transformation for businesses of all sizes. The SMART business survey conducted in Q4 2025 shows that companies view EDM not as a standalone tool, but as a foundation that determines efficiency, security, transparency, and scalability.

Although only 20.5% of companies have fully electronic document workflows while 79.5% continue to operate in a hybrid format, the shift toward full digitalization is irreversible.

## Companies at different stages of digital maturity have varying expectations of EDM, yet they all strive for:

- greater operational efficiency,
- automation and the elimination of manual processes,
- stronger security and controlled access,
- deep integrations,
- the use of AI for document processing and routing.



“Our vision — More organized world in a digital way.” We believe that the future of business belongs to companies that can build orderly, secure, and scalable digital processes. International research has shown that this vision is relevant for businesses across different countries and at various stages of development. The world is moving toward systematic operations and transparency, and technology is becoming the foundation of sustainable growth. That is why we invest in solutions that do more than automate individual processes — they help companies transform strategically.

This is made possible by our comprehensive portfolio of solutions, which cover key business functions and integrate them into a unified digital ecosystem. With this approach, all processes operate in a coordinated, transparent, and manageable way.

[SmartPoint DMS](#) is an important part of this framework — a solution that can be implemented as part of a full digital transformation or integrated with existing enterprise systems, providing a single controlled environment for document management and transparency across key business processes.”



**Natalya Onyshchuk**  
CEO, SMART business

Businesses that implement electronic document management today are effectively investing in their digital resilience and their capacity for future growth. EDM is becoming a core operational foundation — one that will be essential for ensuring competitiveness, scalability, and digital maturity in the years ahead.

## SMART business Recommendations for Electronic Document Management System Developers

- **Prioritize security and access control.** Use secure technologies that meet the highest security standards. Regular certifications and security audits demonstrate that the solution is reliable and that data is well protected.
- **Ensure user convenience and ease of administration.** The interface should be intuitive and responsive across all devices. Study user preferences and behavioral patterns to continuously enhance the system's user experience.
- **Provide ready-to-use integrations with ERP, CRM, and other enterprise systems.** The availability of APIs and seamless integration with business applications ensures high-quality implementation within the IT environment.
- **Leverage AI capabilities and workflow automation.** Document recognition, classification, and automated processing have already become an expected standard.
- **Offer flexible implementation scenarios for different types of businesses.** Take into account the specifics of local markets, where total cost of ownership (TCO) and rapid ROI carry particular importance.



SMART business continuously monitors customer requests and listens closely to evolving business needs. We consistently implement the best global practices and technologies in our solutions, which we continuously develop and refine. When creating the advanced electronic document management system, [SmartPoint DMS](#), we addressed our clients' most common requirements: reliable data storage and information security, scalability enabled by the system's extensive functionality, operational cost efficiency throughout the system lifecycle, ongoing enhancement of the employee digital workspace within the system, the use of AI tools and approaches. The study confirmed that these factors and criteria are fundamental in the development of electronic document management systems.



### **Volodymyr Moskalenko**

Product Owner/ Systems Architect,  
SMART business

## Recommendations for Companies Planning Implementation

- **Be prepared for process transformation.** The shift to full digitalization is not only about technology — it also requires changes in ways of working, employee training, and effective change management.
- **Allocate sufficient resources and time.** The biggest barrier is often a lack of attention and available staff, so plan the implementation in phases with clear goals and defined responsibilities.
- **Define the system's key requirements.** Pay close attention to security, integrations, automation, and user convenience.
- **Leverage the experience of companies that have already gone through this journey.** Responses from fully digitalized organizations show that the main next steps after implementation typically include:
  - scaling integrations with other systems,
  - strengthening security and access control requirements,
  - expanding functionality for document search and processing,
  - implementing AI tools to automate routine tasks,
  - continuously auditing and improving processes.
- **Build in scalability and room for growth.** Introduce changes gradually, involve users in testing and feedback, and ensure your team receives proper training.

# THANK YOU FOR YOUR ATTENTION!

SMART business Team

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SMART business is a leading Microsoft partner in the development, implementation and support of modern ERP, CRM and HRM systems, the development of Microsoft cloud services and solutions based on predictive analytics and ML.

For 17 years, we have been helping our customers build innovative businesses using mature solutions based on modern technologies (including Copilot, Power Platform, Dynamics 365 and Microsoft 365 platforms) and powered by AI.

Our mission is to provide every company with the best way to achieve their strategic business goals.

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