

5 Signs You've Outgrown Your Document System



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When Good Enough... Quietly Becomes a Liability

Most document systems don't fail all at once.

They usually start out working just fine. In fact, many systems in place today were once exactly what the business needed - built for a smaller team, fewer transactions, and less complexity. For a while, they hold up.

Then the business grows.

More people. More locations. More documents. More pressure.

And here's what often gets missed - nothing breaks in a dramatic way. There's no system crash.

No alarm.

Just small adjustments. Workarounds. Accommodations.

People figure it out. Because that's what good teams do.

But step back for a moment:

Is your team working around the system... instead of the system working for them?

After years as a CPA working alongside founders - and later building document management solutions for growing distribution companies - I've seen the same pattern repeatedly:

The real cost doesn't show up on a report. It shows up in behavior.

Over time, certain signals begin to appear. They're easy to overlook, but they're worth paying attention to.



1 People Are Keeping Their Own Copies

Desktop folders. Saved email attachments. Paper copies in desk drawers. Files forwarded “just to be safe.”

Why it happens:

This is what people do when they don't fully trust the system. Maybe search didn't work the way they expected. Maybe they found the wrong version once and decided not to risk it again.

It's not a people problem. It's a confidence problem.

Why it matters

- Multiple versions make it unclear what's current
- Important documents end up outside managed systems
- When employees leave, their “backup system” leaves with them

Question to consider: *If your team had to rely solely on the shared system, would they feel comfortable doing it?*



2 New Team Members Struggle to Get Up to Speed

A new employee joins. Weeks later, they're still asking where things are.

They rely on experienced team members who "know the system."

Why it happens:

Document structures evolve over time. Naming conventions shift. Folder hierarchies grow in ways no one originally planned.

Long-tenured employees understand it. New hires don't.

Why it matters:

- Longer ramp-up time for new hires
- Experienced staff pulled into routine questions
- Growth becomes harder than it should be

Question to consider: "Could a new employee find last quarter's vendor contracts without asking anyone for help?"



3

The Same Documents Get Requested Again and Again

Someone asks for a document. You send it.

A few weeks later, someone else asks for the same one. Or the original person asks again.

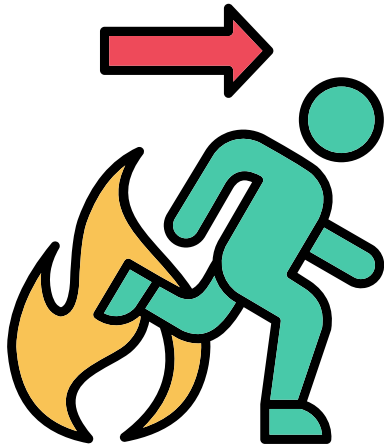
Why it happens:

When finding documents takes effort, people take shortcuts. It's faster to ask someone than to search - especially if search hasn't worked well in the past.

Why it matters:

- The same documents are located repeatedly
- People wait instead of finding answers themselves
- Inboxes become unofficial document storage systems

Question to consider: How often does someone ask for a document that already exists somewhere in your system?



4 Audit Prep Becomes a Fire Drill

When an audit approaches, everything speeds up.

People pause their normal work to track down documents, verify completeness, and assemble records.

Why it happens:

Audits require precision - specific documents tied to specific transactions over defined time periods.

They expose weaknesses that day-to-day operations can work around.

Why it matters:

- Significant time spent gathering documentation
- Key personnel pulled away from core responsibilities
- Longer audit cycles due to slow retrieval

Question to consider: If auditors requested documentation for 20 random transactions, how long would it take to produce it?



5 Critical Knowledge Lives in People's Heads

There are always a few people who “know where everything is.”

When they're available, things move. When they're not, things slow down.

Why it happens:

Over time, experienced employees build institutional knowledge - how things are organized, where exceptions live, which version is actually correct.

The problem is, that knowledge isn't captured anywhere.

Why it matters:

- Operations depend on specific individuals
- Absences create bottlenecks
- Departures mean lost knowledge and rework

Question to consider: If your most experienced employee left tomorrow, what would be hard to replace?

Quick Self-Assessment

How many of these signs apply to your organization?

- People maintain personal document copies

- New hires struggle to find information

- Documents are requested multiple times

- Audit preparation is time-consuming

- Key knowledge is concentrated in a few individuals

What it means

- 0-1 signs:** Your system is holding up well
- 2-3 signs:** Some friction exists - worth evaluating
- 4-5 signs:** Your team is compensating for the system

What Experience Teaches (Sometimes the Hard Way)

There was a time when “good enough” really did seem good enough.

The focus was on execution - moving quickly and managing costs. Document systems were often secondary.

Over time, a pattern becomes clear:

- Inefficiency compounds
- Uncertainty multiplies
- Inaction becomes expensive - usually at the worst time

This isn't about perfection.

It's about alignment.

Is your document management supporting how your business operates today - or how it used to?

Where to Start

Not with technology.

With better questions.

- Why are people creating workarounds?
- Where does friction actually exist?
- How long does it take to find what matters?
- What happens under pressure?
- Where is risk concentrated?

Because solving the right problem matters more than implementing another tool.

Automation alone isn't the answer.

Experience and process understanding are what make it work.

Final Thought

Growth introduces complexity. That's unavoidable.

Unnecessary friction is not.

The organizations that scale well aren't the ones with the most tools. They're the ones where systems quietly support the business - without getting in the way.

So the real question is:

Is your team working harder because of your business growth... or because of your system?

There's a difference. And it's worth understanding.

Invitation

If any of this feels familiar, it may be worth a conversation.

After years working alongside founders as a CPA - and building MaxRecall into an AI-powered document management platform serving wholesale distribution - one thing stands out:

Small process improvements can create meaningful operational gains.

A focused 30-minute discussion can help identify:

- Where friction exists
- Where risk is hiding
- Where automation can make a measurable impact

No sales pitch. Just a practical, experience-driven look at how your document processes are performing today.

Schedule a Call

maxrecall.com/schedule-a-demo/