



WHITEPAPER

# Syncing People, Paper and Processes with Document Management and Automated Workflow

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## Introduction

Paper has been a part of everyday business for a long time. Purchase orders, invoices, contracts, and more are generated on a daily basis as a part of key business processes. These paper documents need to circulate to the right people and once the process is complete, must be stored for future reference. Paper documents are often difficult to locate and retrieve, making information sharing cumbersome.

As companies look for ways to increase productivity and trim budgets, the widespread use of paper has been scrutinized. Organizations must meet the ever-growing demands for higher productivity, compliance requirements and environmental consciousness. Examining the use of paper in your organization can help your business become more productive, streamlined and efficient. What types of paper documents are used in your business? How much do you print and/or copy each day? Can employees quickly and easily access records if needed? Are key business processes slowed down by paper?

Many forward-thinking companies are turning to Enterprise Content Management (ECM) solutions and realizing significant cost savings across a number of business areas. A recent AIIM study reported that 39% of the companies surveyed saw a drop in paper consumption when using ECM. And there's even more potential for savings when companies automate workflows and optimize routing and auto-indexing processes.



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*“Improved information access and knowledge sharing are seen as the strongest benefits of scanning and capture. When combined with the more immediate financial benefits of increased productivity and reduced office costs, this produces a win-win situation.”*  
 © AIIM 2010, [www.aiim.org](http://www.aiim.org)

## What is Enterprise Content Management?

Enterprise Content Management (ECM) integrates document imaging, capture, search and management processes and enables the creation of a centralized data repository. With all documents stored electronically, employees can quickly and easily find, access, and share important business documents. It also helps promote business continuity and enables quick disaster recovery. The purpose of ECM is to transform static, unstructured information and documents into a dynamic part of your business through document management and automated workflow.

ECM provides a framework for syncing people, paper and processes. It starts by converting printed documents into electronic files that can be securely stored and maintained in a centralized location. Any and all of the organization’s documents can be collected and this information can be retrieved by employees at anytime, using an intuitive, easy-to-use interface.

Organizations using ECM solutions are experiencing both direct and indirect savings. In a 2010 report by AIIM , companies cited the following benefits to their organization (ranked in order):

- Electronic access of documents and information sharing.
- Improved productivity.
- Reduced paper storage costs.
- Decreased paper volume and associated costs, including printing, posting and transporting.

It is interesting to note that the strongest long-term benefit reported by companies in this survey is a “soft dollar” savings. Why was this named ahead of some of the direct savings such as storage and shipping fees? With increased access to information, organizations were able to reduce the time spent looking for, and handling, business-

critical documents. Documents are available on-demand. In short, ECM enables organizations to better manage intellectual property so nothing is lost or misused.

Organizations also reported improved productivity as an important long-term benefit. Real-time access to information promotes information sharing and collaboration and allows employees to leverage best practices across the enterprise. This also helps employees provide exceptional customer service and quicker response times.

## ELECTRONIC ACCESS IMPROVES CUSTOMER SERVICE

The ability to instantly pull up accurate customer files enables customer service representatives to answer questions on the spot or provide documentation when needed. Documents can be emailed or faxed directly from the desktop, preventing multiple calls.

### **Automated Workflow**

The benefits of ECM can be further enhanced by using automated workflow tools. With automated workflow, you can seamlessly integrate all of your business operations and systems so that information is available where and when it needs to be. Automated workflow solutions enable you to define your company's processes including tasks, defined user actions and steps needed to complete each task. Tasks can even be ordered and dependent on the completion of other tasks.

A good example of an automated workflow is the routing of key documents for approval. Using ECM and automated workflow, you can transform a paper-based process that previously needed someone to print and complete a form and walk it from office to office for review and signature. Now, you can fill out an automated form on the computer and it will be routed automatically to approvers throughout the organization, in a predefined order. You can see who has already signed off, where the document is now, and whether someone is holding it up.

As organizations seek to optimize the people and processes side of document management, automated workflow can provide additional productivity and financial benefits. Organizations can leverage features such as routing and auto-indexing to:

- Eliminate manual business tasks and activity.

- Reduce risk.
- Provide accountability and audit trails.
- Improve quality and turnaround times.
- Diminish and track bottlenecks.

## **Top 7 Tips to Selecting the Right ECM Solution**

Take control of the unstructured information that overwhelms your office. Automate business processes and improve management of your corporate intellectual property. If your organization would like to gain substantial improvements in business processes, while reducing paper costs, here are seven tips to help you select the solution that will help you achieve your goals and get a quick return-on-investment (ROI).

### **1. Proven ROI**

When selecting an ECM solution for your organization, look for one that offers a proven and quick return-on-investment. Some ECM providers have enabled customers to successfully achieve ROI in as little as 6 to 9 months. This can be realized in a number of ways including fast implementation, smooth integration with other business applications and more –these will be discussed later in this paper.

When evaluating ECM solutions, consider both the direct savings—such as reduced resources and hardware costs—and the “soft dollar” benefits. By increasing productivity from 50% to 500%, organizations can enjoy significant savings by redirecting valuable resources to other critical areas of the business.

### **RETURN ON INVESTMENT IN LESS THAN ONE YEAR**

The Rheinern Group estimated that ClosetMaid saved over \$100,000 within the first year of using ECM. This direct savings came from the elimination of labor and hardware related to its old microfiche system. The timely access to critical business information provides additional savings to the company.

### **2. Knowledgeable professional services team**

When your organization is evaluating ECM solutions, make sure to choose a provider that will work with you side-by-side to ensure that deployment strategies and product integrations are properly planned and supportable. A knowledgeable professional services team with document management and workflow experience can make all the difference in a smooth implementation.

The best ECM providers will offer complete assessments of your business in order to minimize business disruption and ensure that your employees can get up and running quickly. A strong professional service team will create a detailed plan that will move your solution implementation through a clear process—the same way your documents will flow through a logical workflow. Proper planning will help you achieve a fast ROI.

## **MAKE SURE YOU GET A THOROUGH ASSESSMENT OF YOUR BUSINESS**

A knowledgeable professional services team will help you get the most out of your ECM solution right from the start. Make sure your ECM provider completes a thorough assessment of your business including:

- Organizational goals and key performance indicators
- Current business needs
- Cost-benefit analysis
- Current document capture, management, workflow and processes
- Current infrastructure assessment to make sure you have no surprises

### **3. Quick and easy implementation process**

In addition to an experienced professional services team, look for a solution that can get you up and running quickly. Some ECM solutions can be implemented in just 30 days—and you can effectively work with the product from the start. This enables your organization to make effective and measurable change and can help you realize a complete ROI within 6 to 9 months.

### **4. Smooth integration with other line-of-business software**

When investing in a new software solution, you want it to work with your existing business software. Make sure your ECM solution offers smooth, no coding integration so that you can easily share data between applications, without needing a programmer. Otherwise, you may end up paying extra for a developer to integrate your systems. Look for a product that offers simple integration tools that any user can leverage so your organization can further correlate data and increase usability.

### **5. Easy-to-use, intuitive interfaces to access information**

Choose an ECM solution that offers secured access to information

in a single, browser-based application. With an intuitive interface, your workforce will be empowered to easily organize and share information. Look for tools like dynamic linking, which enable you to link together related documents for easy retrieval. By eliminating data silos, you'll further minimize search times and increase productivity.

**6. Reduces and eliminates manual administration and monitoring of document routing and handling**

The right ECM solution will enable your company to sync your people, paper and processes from the start. Look for a solution that offers authorized users instant access to information when and where it is needed. You'll also want a solution that provides built-in ad hoc workflow so you can optimize and automate business processes. With these powerful features, you'll eliminate time-wasting manual paper processes and replace them with improved document sharing and collaboration across departments.

**7. Automates and enforces business rules and processes**

Another way to help your company achieve a quick ROI is to take advantage of workflow automation tools in your ECM solution. Auto-indexing features make sure your data is organized according to business rules and prevents lost or misfiled documents.

Also look for the ability to add your own business process routing. Some ECM solutions offer an easy-to-use graphical interface, users can simply draw business processes to automate work tasks and integrate systems. This enables organizations to set up approval processes, routing, audit trails, and adds security to the management of document processing.

## CUSTOMIZABLE BUSINESS PROCESSES SAVE THOUSANDS

"ClosetMaid especially likes that [their ECM solution] iDatix offers a series of classes that empowers users to add their own business process routing and development to iSynergy that, from our experience, can save thousands of dollars annually, per license, when compared to other ECM software."

-The Rheinner Group

## Conclusion

In order to decrease the costs of producing, handling, and storing paper, many forward-thinking companies are turning to Enterprise Content Management (ECM) solutions. ECM is not just the simple electronic capture and imaging of documents. More than that, ECM provides a framework for syncing people, paper and processes.

Document capture and imaging is just the first step to enterprise content management. With a centralized data repository that can be remotely accessed and queried, ECM makes finding and sharing documents simple and easy. And when businesses add automated workflow to enterprise content management processes, they gain additional productivity and financial benefits. Not surprisingly, improved searchability, knowledge sharing and productivity are some of the most important reasons why companies are implementing ECM solutions and realizing a complete ROI in less than a year.

## About iDatix

iDatix is an emerging leader in the development of document management and workflow automation software all designed to simplify the workplace. Launched in 2000 by Founder and CEO, Steve Allen, the company is headquartered in Clearwater, Florida. iDatix has a proven track record of saving companies millions of dollars through the use of its technology and focus on business automation. Designed with ease of use, seamless integration and accelerated deployment in mind, the iDatix software suite offers companies increased productivity and a quick ROI.

### TO LEARN MORE...

To learn more about the iDatix ECM Software Suite - iSynergy, ScanDox, iLink, iDox, Xtractor, Barcoder, Progression - visit [www.iDatix.com](http://www.iDatix.com) or call (727) 441-8228.



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