

# Syncing People, Processes and Information



As companies look for ways to increase productivity and trim budgets, the widespread use of paper and manual processes has been scrutinised. Organisations must meet the ever-growing demands for increased productivity, compliance requirements and environmental consciousness. Examining your processes can help your business become more productive, streamlined and efficient.

## To begin, ask yourself:

- What types of paper documents are used in my business?
- How much of my business is interrupted by manual requirements that could be automated?
- How much do we 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 process improvement solutions and realising significant cost savings across a number of business areas. A recent Allm study reported that 39% of the companies surveyed saw a drop in paper consumption when using process automation and document management. And there's even more potential for savings when companies automate workflows and optimise routing and auto-indexing processes.

## Document Management

Document Management integrates document imaging, capture, search and management processes and enables the creation of a centralised 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 this is to transform static, unstructured information and data into a dynamic part of your business through document management and process automation.

This 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 centralised location. Any and all of the organisation's documents can be collected and this information can be retrieved by employees at anytime, using an intuitive, easy to-use interface.

Organisations using solutions are experiencing both direct and indirect savings.

In a 2010 report by Allm, companies cited the following benefits to their organisation (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, organisations were able to reduce the time spent looking for, and handling, business-critical documents. Documents are available on demand. In short, these solutions enable organisations to better manage intellectual property so nothing is lost or misused.

Organisations 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. 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.

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## Process Automation

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

A good example of an automated process is the routing of key documents for approval. Using process automation, and connecting it to your business information with electronic document management, 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 electronic form online, and it will be routed automatically to approvers throughout the organisation, in a predefined order. You can see who has already signed off, where the document is now, and whether someone is holding it up.

**Organisations 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

If your organisation would like to gain substantial improvements in your business processes and go paperless, then process automation and document management may be right for you.

Here are eight tips to help you select the right solution for your business that will enable you to achieve your goals and get a quick return-on-investment (ROI).

### 1) How to Select a Process Automation & Document Management Solution: Proven ROI

When selecting a solution for your organisation, look for one that offers a proven and quick return-on-investment. Mature solutions are known to deliver an ROI in as little as 6 to 9 months. This can be realised in a number of ways including a fast implementation, smooth integration with other business applications and more -these will be discussed later in this paper.

When evaluating 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%, organisations can enjoy significant savings by redirecting valuable resources to other critical areas of the business.

### 2) Knowledgeable Professional Services Team

When your organisation is evaluating solutions, make sure to choose a provider that will become your partner in success; you don't just want a technology, you want a partner that will work with you side-by-side to ensure that deployment strategies and product integrations are properly planned and supported.

A knowledgeable team with process improvement experience can make all the difference in a smooth implementation.

The best providers will offer complete assessments of your business in order to minimise business disruption and ensure that your employees can get up and running quickly. An experienced partner will create a detailed plan that will move your solution implementation through a clear process. Proper planning will help you achieve a fast ROI.

### 3) Make Sure to Get a Thorough Assessment of Your Business

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

- Organisational 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

*"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, Aiim.org



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#### 4) Quick and Easy Implementation Process

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

#### 5) Smooth Integration With Other Line-Of-Business Software

When investing in a new software, you want it to work with your existing business systems. Make sure your 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 or a developer to integrate your systems. Look for a product that offers simple integration tools that any user can leverage so your organisation can further correlate data and increase usability.

#### 6) Easy-to-Use, Intuitive Interface to Access Information

Choose a solution that offers secured access to information in a single, browser-based application. With an intuitive interface your workforce will be empowered to easily organise and share information. With a drag-and-drop graphical interface even business users can simply draw business process to automate work tasks and integrate systems. Look for tools like dynamic linking, which enable you to link together related documents for easy retrieval. By eliminating data silos, you'll further minimise search times and increase productivity.

#### 7) Reduces Manual Administration and Monitoring

The right solution will enable your company to sync your people, paper and processes from the start. Look for a solution that offers authorised users instant access to information when and where it is needed. With the powerful features of process automation, you'll eliminate time-wasting manual paper processes and replace them with improved document sharing and collaboration across departments.

#### 8) Automates and enforces business rules and processes

Another way to help your company achieve a quick ROI is to take advantage of process automation across your entire organisation. Auto-indexing features make sure your data is organised according to business rules and prevents lost or misfiled documents. Also, look for the ability to add your own business process routing. This enables organisations to set up approval process, routing, audit trails, and adds security to the management of document processing.



#### Proven Results

Before ClosetMaid found iDatix, the company committed over 8,000 A/P invoices each month to microfiche. Retrieving archived data could take a week or more.

With a DM system, AP professionals now scan incoming invoices right away. ClosetMaid saved over \$100,000 in labour costs and equipment in just their first year using document management and workflow solutions and they're just one example

#### About Dajon

We are your process improvement specialist and know how to leverage today's technology to get the most from your people, processes and information.

Each client is a partner and our passion is helping to deliver solutions that provide unmatched performance.

Let us show you the possibilities, help you to create a new vision and empower you with the tools, knowledge and resources to get the job done.

Discover how our process improvement solutions have already helped companies like Lockheed-Martin, AG First Farm Credit, ClosetMaid and Morton Plant Hospital gain more from their existing systems, fill the gaps between departments and make their workforce more effective.

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