



Digitech Systems White Paper

2015

Improving Your Business Process Efficiency

Do you have complicated, paper-centric business processes? If you're like most business professionals, you're probably overwhelmed by keeping track of where documents are, and who they're going to next. Maybe you've looked into a Business Process Management (BPM) software solution to lift the strain off your employees' shoulders, but good solutions are hard to come by. What you may not know is that without this technology, you may be vulnerable to lawsuits, compliance violations, and more.

How do you manage your current set of business processes? If documents are loosely organized, must be hand-delivered from employee to employee, or entered into databases manually, then you may be interested in a business process management system. For any business, processes are important. Documents have to flow in a certain order and be processed accordingly. In manually controlled business processes, this often results in lost documents, bottlenecks, and difficulty responding to customer requests. When you implement a BPM or workflow system, not only will your behind-the-scenes operations run more smoothly, you'll gain the added benefit of impressing your customers with faster turnaround times. In fact, customer satisfaction should be your number-one motivator when deciding on and designing your business process. Smooth and efficient processes equal happy customers, and happy customers equal more business.¹

What is BPM?

Who should I send these documents to? Who should field customer service calls? When do we need to process payments? BPM automates the answers to these questions. When processes and job roles have been defined, workflows run more smoothly, resulting in a much more pleasant customer experience.

Business Process Management Definition:

“Business process management (BPM) is a systematic approach to making an organization's workflow more effective, more efficient and more capable of adapting to an ever-changing environment.”

-TechTarget²

BPM software automates these processes, sending documents, such as invoices, to the next step seamlessly by allowing the user to set up as many workflows as they need, consisting of an unlimited number of worksteps. These worksteps can be given a deadline if necessary.

Why do you need a BPM software? Well, technology is moving extremely fast. Experts at Gartner estimate that by 2016, “70% of the most profitable companies will manage their business processes using real-time predictive analytics or extreme collaboration.”³

Not only will technology leave you behind, but your profits may leave you behind as well. Businesses who employ an effective BPM strategy experience measurable profits due to increased efficiency. In a BPM survey conducted by Haploos, “53% [of respondents] said their managers never or only occasionally use performance data to manage their processes.”⁴ That means that your processes might be inefficient, and you don't even know it!

Business Process Management Methodology

BPM theory is necessary to run a productive and profitable business. If a company is sending documents to two people when they could easily be processed by one, they lose efficiency, control, and money. When too many hands get involved in a workflow step, the likelihood of errors increases greatly. This costs the company time, affects the bottom line, and frustrates customers, business partners, and shareholders.⁵

So where does BPM software come in? Once your company's business processes have been clearly defined, software can increase efficiency and save time. Imagine a system that alerts the user to a document needing their approval. The user approves the document, but then needs to send it to another office. Instead of having to fax or hand-deliver it, the software will automatically route the document to the next person for a processing step. That user will then be notified, approve the document, and it's completed. This can happen in a matter of minutes instead of days. What happens when things get processed faster? Customer satisfaction rates skyrocket, your employees are happier, and better decisions get made throughout your organization.

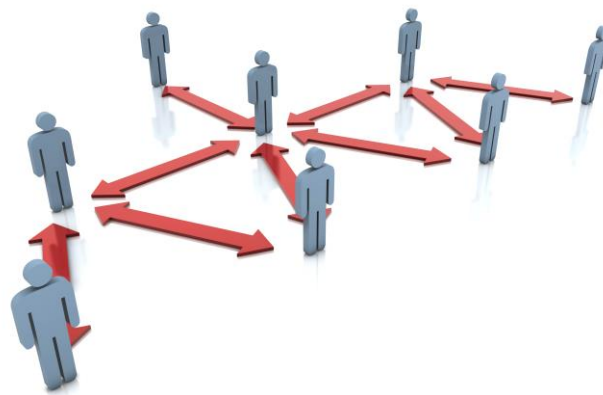
Is Your Business Ready for BPM?

While any business or organization can benefit from a workflow solution, it's easier when that business has reached a Level Three or greater in their process organization. What this means is a well-established company that has already completed their BPM methodology analysis will have the greatest success with BPM software.

The levels of process maturity are as follows:

- **Level One:** The processes aren't defined yet, and the company's success relies heavily on individual effort.
- **Level Two:** Basic processes are defined and some management processes are established to track spending and other related activities.
- **Level Three:** Most of the organization's processes are clearly defined, documented, and repeated over and over. The company is working towards a secure business process architecture.
- **Level Four:** Detailed process information is collected and available. Managers use this information to control the processes.
- **Level Five:** The company collects feedback from the process users to continually improve.⁶

If you're feeling like your organization is sitting at Level One or Two, don't stress. You can still benefit greatly from a workflow solution. In fact, it might be the very thing you need to bump your business up to Level Three or higher, thereby improving performance around your organization. Simply make sure you carefully evaluate processes as part of the implementation of the technology.



ECMNOW!

All businesses value efficiency, control, and money. In today's rapidly growing economy, your company is looking for effective ways to cut costs. You want to streamline processes, increasing efficiency. You also need to stay in compliance with increasingly complicated laws and regulations, so you need control. BPM can offer you these things and more.

- **Efficiency:** cut down on processing times by identifying unnecessary steps in a workflow and eliminating them.
- **Control:** increase security and keep better track of documents by having an administrator assign permissions to view certain documents. The software will allow users to run a report. They can then see any unauthorized attempts to view documents or worksteps, and provide an audit report showing who accessed what information and why.
- **Money:** lower labor costs by increasing each user's productivity, saving money and growing your business.

When your company gains **efficiency, control, and money**, your **ROI is maximized**, "leveraging all three dimensions of cost, revenue, and motivation." Fagebaum, 2013.⁷

Potential Legal Ramifications

Maybe you're constantly emailing documents to people and requesting signatures. Worse, maybe you're hand-delivering documents to colleagues. With paper processes like this, you leave yourself open to security breaches. Who is looking at your patient records or financial documents? When are they looking? Why? If you don't know, you could be in violation of the law. Oftentimes, these breaches lead to fines, revocation of licenses, or worst of all, jail time.

In many industries, compliance is an important facet of your business. When compliance isn't maintained, your business could be at risk. With the passing of the Sarbanes-Oxley Act of 2002 (SOX) and the Health Insurance Portability and Accountability Act of 1996 (HIPAA), compliance is more important now than ever. These laws get updated frequently, and it's your responsibility to make sure you're fully in compliance at all times. Even minor missteps at the hands of your employees can cost you.⁸ How does BPM help? High privacy standards across multiple industries demand that patient and client records be kept safe and confidential. If you're not meeting these standards of compliance, you could lose your credibility as a business, your business itself, or face jail time.

BPM helps you with compliance by:

- Providing documented evidence of compliant procedures with detailed audit reports.
- Monitoring compliance by live-tracking document progress with continually updated activity reports.
- Ensuring proper procedures are completed within set timeframes by receiving alerts showing stalled or inactive documents.

In short, BPM can make compliance easy!

Ready to Take Control?

What if you had a software application that could automate your workflows and integrate with solutions you already have? The software should also allow you to create workflows as complex or as simple as you need them to be. BPM can do that for you! Benefits include:

- Increased productivity
- No more time-wasting bottlenecks
- Faster document processing times
- Decreased exposure to security threats
- Documented evidence of compliant procedures

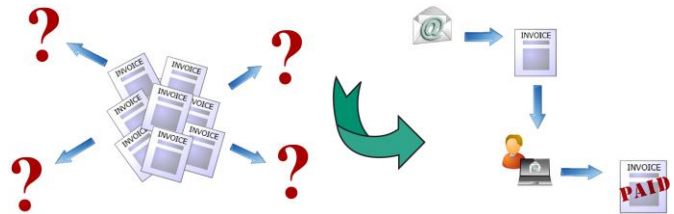
The Digitech Systems Answer

Make standard business operations easy to execute and easy to manage with PaperVision® Enterprise WorkFlow and Business Rules for PaperVision® Capture. Identify process inefficiencies and bottlenecks with continually updated reports showing document status. Automated workflows can make your life infinitely easier. Increase customer satisfaction by responding to requests more quickly, giving instant answers, and decreasing document processing time.

PaperVision® Enterprise WorkFlow

PaperVision Enterprise® WorkFlow is a clean, simple answer to your BPM needs. We've rewritten the product from its roots, so if you haven't looked at it lately, it might be time to take a closer look. Here are just a few of the changes we've made:

- It's now easier to set up. WorkFlow allows users to make simple process changes themselves by using a graphical drag-and-drop setup system.
- Sensible pricing models make it affordable, no matter the size of your business.
- It's part of PaperVision® Enterprise and ImageSilo®, so it's a fast and easy integration.



PaperVision Enterprise WorkFlow helps solve many common business process problems. It's the ultimate in business process management. WorkFlow enables businesses to fully automate standardized business processes, routing any document, anywhere, anytime, all while tracking the process and alerting users of new work assignments. Best of all, this product is available with our on-premise (PaperVision® Enterprise) and cloud (ImageSilo®) ECM systems.

Terrus Real Estate receives more than 20,000 paper invoices annually. Managing all that paper was a huge hassle until the company started using PaperVision Enterprise WorkFlow. Now management saves more than 1,150 hours of productivity annually, employee productivity is up 30%, and the company is saving more than \$75,000 each year.



"Approving invoices is a lot more enjoyable with PaperVision Enterprise WorkFlow. I open the email and have all the supporting documents and accounting codes I need to verify and approve invoices. I don't have to go back to the accounting system to search for information. I just click OK and the invoice is routed to the next step in the process. It couldn't be easier."

Phil Akason, CFO

PaperVision® Capture Business Rules



If you're looking for automation in your capture process, check out Business Rules! It turns time-consuming data processes into simple ones. Using PaperVision Capture for AP or healthcare? Business Rules can do that!

- Business Rules for AP helps businesses to simplify information capture, improve data accuracy, and reduce the cost of Accounts Payable.
- General Business Rules makes it easier and less expensive for high-volume capture environments to manage data capture and verification, and to simplify indexing through data matching.
- HIPAA 837P Business Rule allows you to input and generate professional medical claim data into the approved HIPAA 837P EDI ANSI transaction file format to improve control of protected patient information, to speed medical claims processing, and to save you money.

As a state-of-the-art injection mold producer, MSI Mold Builders wanted to digitize their AP processes and cut down on processing time for over 1,200 invoices received monthly. Using a suite of *ECMNOW!* products, including PaperVision Capture Business Rules, they've increased efficiency, saved money, and gained control.

"We started using PaperVision Capture Business Rules to help us better route the invoices being received daily. It's saved us countless hours of sorting documents and merging data. It even helps us verify invoice totals, all with the click of a button!"

-Jason Sojka, Network and Computer Systems Manager

When combined, Business Rules and WorkFlow become a powerful business solution, capable of solving even the most complex challenges. It makes business processes run more smoothly. Easy enough, right? Business operations become easier to execute and easier to manage. Chances are, you need something to help with that!

Conclusion

Ready to start managing your business processes more efficiently? Talk to your employees and co-workers to find out if they feel the lack of business process management is as much of a burden for them as it is for you. The answer is likely YES! Increase your customer satisfaction, tighten up security, and BPM is a quick fix that will produce quick results and protect you from legal ramifications. Get on the fast track now!

"If your customer finds that it is easier to purchase from your competitor, you have a problem. How many customers do you need to lose before the dollar amount of the problem exceeds the cost of a solution?"

-Cleveland, 2012⁶



Additional Resources

Speaking to the C-Suite about BPM

Bonitasoft takes a more in-depth look at selling BPM to C-level employees in their whitepaper. Download it by entering your information.

www.bonitasoft.com

ECM

This website can tell you anything you want to know about ECM. Packed with full researched statistics and research, it's a good resource for all things ECM.

<http://www.gartner.com/it-glossary/business-process-management-bpm>

BP Trends

This is a site devoted specifically to the changes, trends, and market forecasts with regard to business processes.

www.bptrends.com

AIIM

Get more information on ECM news and industry research from the ECM industry perspective. This organization follows the industry closely, including the capture market, for news, updates, market watch and more.

www.aiim.org

Digitech Systems

At Digitech Systems, ECM is our bread and butter. We want to help you understand what ECM is and our website is one of the best places for you to learn more about the technology, accompanying products, education and expertise we offer.

www.digitechsystems.com

PaperVision Enterprise WorkFlow

The best place to learn even more about PaperVision Enterprise WorkFlow is right here. You'll find a product sheet, testimonials, an infographic, and more.

www.digitechsystems.com/products/papervision-enterprise-workflow

Vocabulary and Terminology

Business Process Management

BPM is a way of looking at and then controlling the processes that are present in an organization. It is an effective methodology to use in times of crisis to make certain that the processes are efficient and effective, as this will result in a better and more cost efficient organization.

C-Suite

A group of executives that are each in charge of a specific business function. CEO (chief executive officer), CFO (chief financial officer) and COO (chief organizational officer) are just a few of these. These are also referred to as “C-level” employees.

FRCP

The Federal Rules of Civil Procedure (FRCP) govern all civil actions and proceedings in U.S. district courts. FRCP amendments require every company involved in lawsuits and federal litigation to preserve and recover electronic documents and email messages as part of the discovery process. If a business is involved in a civil action in federal court, FRCP procedures, including precedents for electronic discovery, must be followed.

HIPAA

HIPAA is a federal law allowing persons to qualify immediately for comparable health insurance coverage when they change their employment relationships. Title II, Subtitle F, of HIPAA gives the U.S. Department of Health and Human Services the authority to mandate the use of standards for the electronic exchange of healthcare data; to specify what medical and administrative code sets should be used within those standards; to require the use of national identification systems for healthcare patients, providers, payers (or plans), and employers (or sponsors); and to specify the types of measures required to protect the security and privacy of personally identifiable healthcare information.

SOX

Introduced in 2002, the Sarbanes-Oxley Act (SOX) was designed to combat accounting fraud, improve financial disclosures and increase corporate responsibility. Any U.S. publicly-traded company who does not follow the laws outlined by SOX could face extreme penalties. It regulates the activities of executives and management as well as the accounting and auditing firms that provide services to nearly 20,000 public companies.

Workflow

A workflow is a set of steps that, when combined together, make up a business process.

PaperVision Enterprise WorkFlow Case Studies

For more real-world applications and testimonials on how companies are using PaperVision Enterprise WorkFlow to enhance efficiency, gain control and save money, please visit MyDSI at MyDSI.DigitechSystems.com.



Western Guaranty Fund Services

After implementing PaperVision® products, including WorkFlow, Western Guaranty Fund Services improved efficiency by more than 500 hours, saving \$64,000 annually.



Commercial Metals Company

CMC accelerated accounts payable (AP) processes, improved compliance by as much as 70% and saved \$132,000 annually.



Terrus Real Estate Group

Streamlining processes allowed them to save 1,150 hours each year in approval processes.



FICOR

Automated document processing allows FICOR to efficiently manage faxes, saving \$140,500 annually.



WorldWide
Integrated Supply
Chain Solutions™

Worldwide ISCS

By implementing PaperVision WorkFlow to manage thousands of invoices each week, they increased revenue by 30%.

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Digitech Systems, Inc.

Digitech Systems, Inc. enables businesses of any size to more effectively and securely manage, retrieve and store corporate information of any kind using either PaperVision® Enterprise content management (ECM) software or the world's most trusted cloud-based ECM service, ImageSilo®. Digitech Systems has moved ECM from a luxury convenience to an essential element for every well-managed business by improving efficiency, boosting information control and saving organizations money. They are the source for EfficiencyNOW!, ControlNOW!, MoneyNOW! ECMNOW!

Digitech Systems continues to raise the standard of excellence in the ECM sector, as evidenced by the numerous awards they have received including the InfoWorld 100, CRN's Emerging Tech Dynamos and multiple Nucleus Research ROI Awards. In addition, Buyer's Lab has recognized both PaperVision® Capture and PaperVision® Enterprise as the best products in the enterprise capture and ECM fields. To learn more about the company's software and services that deliver any document, anywhere, anytime, visit www.digitechsystems.com.

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