



Digitech Systems Whitepaper

Process Automation: Improving Business in Your Sleep

Are your customers still working at the speed of paper? Are their business processes outdated and manual? What if they could start and finish routine tasks automatically, rather than spending hours hand-keying data or walking files around the office? process automation, specifically Business Process Automation (BPA), puts the machines to work so your customers don't have to! Any repetitive task that is costing your customers unnecessary time and money can be alleviated with BPA. As a Digitech Systems' reseller, you can offer several automation solutions with custom options to meet customer needs, such as: Robotic Process Automation (RPA), workflow, and Intelligent Automation (IA) that integrates Artificial Intelligence (AI) capabilities to further automate non-routine processes and more complex information.

Process Automation tools can dramatically improve your customers' efficiency and accuracy, and adding these beneficial technologies increases your sale size. If you are interested in growing your business while helping your customers save valuable time and money, read on to learn how process automation can help!

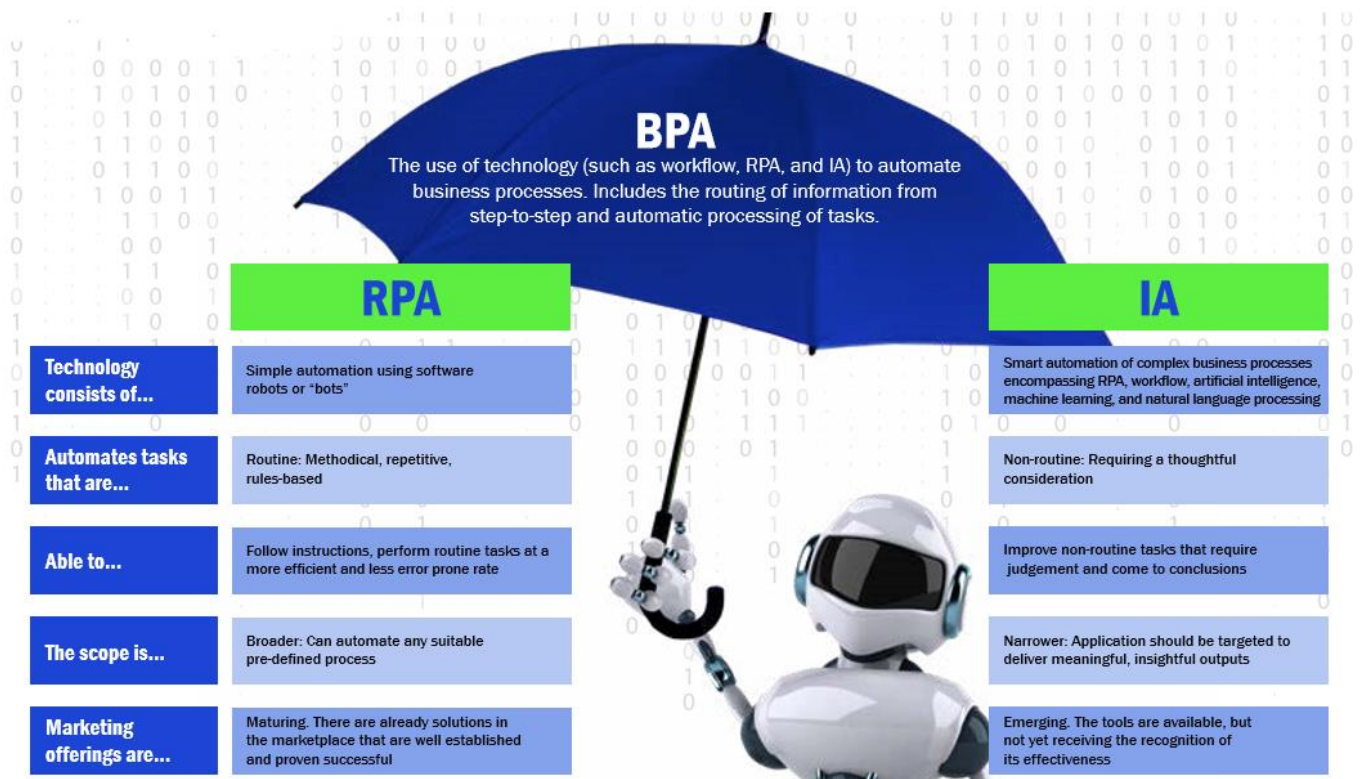


If paper is the foundation of your customers' day-to-day business processes, why should they consider overhauling their information management with automation? Have you ever heard your customers complain about taking time out of their day to finish tedious tasks? What if your customers didn't have to manually enter data, or pass documents from desk to desk, saving their time and resources for more important work?

When considering saving time and money on routine document management, the benefits of switching to process automation are undeniable. You can never go wrong suggesting automation technology for any-sized enterprise, because organizations worldwide are constantly looking to identify processes that can be automated to accelerate productivity.¹ Any investment in BPA, including RPA, IA, and workflow, is trending with a ROI-positive market, because it solves large and small paper problems across various industries, and keeps enterprises current and competitive in this digital world.

Market Overview

At least 45% of all work activities can be automated.² Any business process that involves managing paper or electronic documents can be automatically completed by RPA, IA, workflow, or— as a more effective strategy— a combination of these tools. As seen in the graphic below, BPA includes a range of capabilities from automating simple tasks, to more sophisticated processes, which allows customers to choose the best solution to suit business needs. The digital revolution is promoting connectivity of business processes with advanced technologies, which is vital for the integration and development of a robust automation environment.³



The financial services industry is especially deploying process automation to increase productivity and revenue. Researchers report 96% of business leaders agree that BPA improves business processes, and 79% agree that BPA is significantly needed for the success of business,⁴ specifically in accounts payable processes. The involvement of process automation also enriches the consumer experience owing to better customer support and reduced lead times for the products.⁵ By the end of 2019, cognitive systems, RPA, and chatbot technologies will eliminate 20% of service desk interactions.⁶ In the HR sector, automation is transforming the back-office activities with onboarding processes, so implementing this software solution is increasing the bottom-line margin and reducing stress.⁷

Other than financial services, customer support, and HR, prominent contributors in the process automation market include manufacturing, healthcare, retail, and telecom or IT.⁸

A Sizeable Opportunity

Encompassing the entire process automation marketplace, McKinsey & Company predicts automation technologies will have an economic impact of between \$5.2 and \$6.7 trillion by 2025.⁹ This rapid growth is attributed to the increasing number of benefits offered by BPA solutions, including better productivity, ease of use, flexibility, and reduction in the time to wait for customers.¹⁰ The versatility of this business solution offers a substantial opportunity you can offer your customers. Looking closer at the sizeable automation marketplace, the following sub-markets of process automation are also expected to grow.

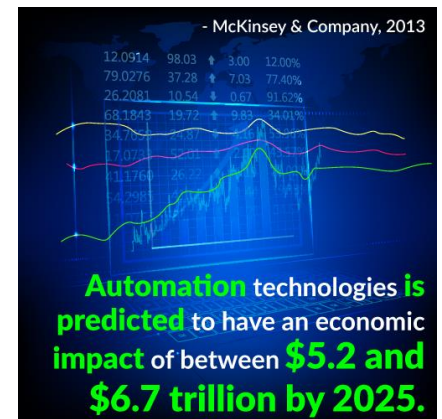
- RPA market will grow from \$1.7 billion in 2019 to \$2.9 billion by 2021.¹¹
- Financial services market, has the highest automation adoption rate with an estimated revenue of \$319.6 million in 2018, which is expected to reach \$955.2 million by 2023, growing at a CAGR of 24.5% during 2018-2023.¹²
- Cognitive RPA and IA market will expand, since IDC expects AI market spending to increase from \$12 billion in 2017 to \$57.6 billion by 2021, a CAGR of 50.1%.¹³

It's important for you to understand the beneficial capabilities of process automation now, so your customers will understand how to invest in automation to compete effectively in their markets overtime.

Drivers of Growth

Rapid adoption of AI technologies to meet consumer demand and stay ahead of the competition is the underlying driver of the process automation market. Both consumers and enterprise executives know that AI has the power to change the way everyone does business. By 2030, AI is predicted to contribute up to \$15.7 trillion to the global economy, but what many business leaders don't know is how to deploy AI, not just in a pilot here or there, but throughout the organization, where it can create maximum value.¹⁴

Starting with a foundation in process automation is the perfect step toward deploying AI capabilities in the future, and staying on trend with the following drivers of growth.



spent collaborating and creating as a team. BPA solutions provide organizational transformations; they aim to drive efficiency, provide transparency, and facilitate compliance for repeatable processes.¹⁸

Trend Three: Replace Routine Tasks to Empower Employees

Yes, process automation technology will replace repetitive manual labor—But that doesn't mean it will replace your job if you're prepared! Seven percent of jobs that can be automated will be lost,¹⁹ so 14% of the global workforce (375 million workers) will need to switch occupational categories by 2030, due to machines doing work previously done by humans.²⁰ This has already started to take a drastic effect; in 2019, startup businesses—operating in a more agile, lean and scalable fashion—will look at the world through the lens of tasks, not jobs, and will build business models around automation principals.²¹ This means that if your customers have employees who were hired for repetitive, manual responsibilities, they should focus on enhancing higher-level thinking in order to stay employable over the long term.

The good news is, by 2020, the development of process automation technologies and AI will create 2.3 million jobs which is a net gain of 500,000 jobs.²² If employees build their skills accordingly, they have an exciting opportunity ahead of them thanks to the new non-repetitive jobs AI and automation will present by 2020.

Don't panic! The foundation of economies is cyclical, and we are simply facing an underlying change. You'll adjust! 😊

Digitech Systems' BPA Solutions Meet This Need

Enterprise Content Management (ECM) enables process automation because it pulls information from a variety of formats, applications, and storage locations into a single system for security, retention, and retrieval. Unlike most competing BPA solutions, Digitech Systems' product suite enables complete automation of a document's lifecycle from creation, through business processes, to retention and destruction.

PaperVision® Capture is where our comprehensive automation solution begins: enterprises can scan and index their paper files, records, documents, etc., and PaperVision® Forms Magic Technology uses advanced recognition technology to automatically classify documents by type and to extract critical business data, including the index values used to organize and find the files in seconds using PaperVision® Enterprise on-premise ECM or ImageSilo, the world's most trusted cloud ECM service. This automation allows your customers to scan, index, classify, and store any document or file despite complexity with the click of a button, since human intervention is only required when handling exceptions.

Once documents are stored in PaperVision Enterprise or ImageSilo, you can securely protect and instantly retrieve information with ease anytime, anywhere, and on virtually any device. To further automate customer's processes, PaperVision® Enterprise WorkFlow can route documents through any business processes to enable accessibility and productivity. And, Digitech Systems' process automation tools complete your automation offering. PaperVision® Integration Manager (PIM) and Integration Definitions simplify sharing information between systems without complex coding, and the RPA bot, PaperVision® Automation Manager (PAM) automates any repetitive task previously done by humans and shows its work on-screen! The PAM bot can handle many tasks including data entry, file searching, or even information comparisons between systems to flag irregularities. The possibilities are endless.

Your Unique Opportunity

The Products You Sell

When implemented together, BPA and RPA enhance the benefit that neither tech can deliver alone.²³ Since, as a Digitech Systems' reseller, you can offer both BPA and RPA technology, your customers will have enhanced automation benefits and make more money on every sale! Process automation increases the average size of every sale for resellers, so expertise in this area will dramatically increase company growth and productivity. Plus, with all the customizable products, pitching an opportunity will be easy because there is a solution for every unique business process need.

PaperVision Forms Magic Technology

You can't find an opportunity like this one anywhere else. Forms Magic continues to receive enthusiastic feedback from various analysts, awards, and users in the market as its quality IA technology is faster and more accurate than most recognition algorithms. You can't afford to miss out on its advantages of process automation, including:

- Patent-protected software that is customizable to any industry need
- Consecutive award-winning solution, BLI 2015: Outstanding Achievement in Innovation to today's Pick Award 2019 as Outstanding Capture and Workflow solution
- Easy implementation, no arduous setup or pre-programming, and satisfied customers



Digitech Systems PaperVision Capture R90
Outstanding Data Capture & Workflow Solution

We were instantly impressed. Forms Magic is like facial recognition for documents.

—Jamie Bsales, Director, Office Workflow Solutions Analysis at BLI, 2019

PaperVision Enterprise WorkFlow

By automating processes with WorkFlow, your customers can seamlessly integrate documents and files across any-sized enterprise, enabling automatic document routing. This opportunity provides efficiencies that allow companies to grow without adding new staff, while improving productivity across teams and departments.

- Automatically assign duties to alleviate process bottlenecks and improve efficiency
- Flex to accommodate any business process, by customizing any aspect of a process.
- Eliminate manual desk-to-desk folder routing by automating all document traffic, which increases accessibility while improving security to enhance compliance

Process Automation Tools

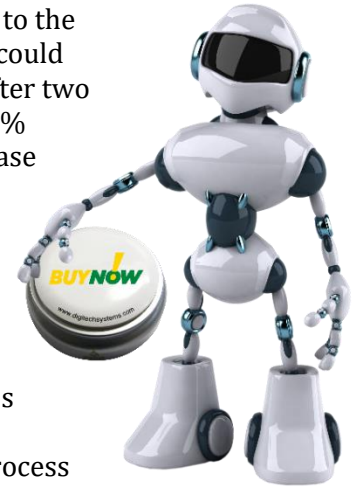
Process automation tools, such as the PAM bot, reduce processing times and save money on routine labor, and the PaperVision® Integration Manager allows customers' ECM system and all LOB applications to share information with one another. The RPA technology of PAM allows employees to perform advanced lookups in seconds, automate data entry, and customize many other automations.

- Streamline processes to allow expensive employees to reallocate their routine task efforts to big-picture innovations
- Improve the productivity of the entire enterprise, and save money on new-hires, paper, printing, and storage

Issues and Technologies

Cost and Efficiency of Processes

The bottom line is: automation of any process is faster as well as less costly to the company.²⁴ Before this technology was readily available, enterprise clients could expect a 5-10% productivity improvement in their outsourcing contracts after two years—but now we see examples in which enterprises are realizing 40-140% improvement over the same time period using process automation to increase operational speed and scalability, improve compliancy, and avoid future costs.²⁵ In the ECM world, BPA like workflow advances team efficiency, since everyone is connected to the digitized information and provided a helpful business process model and notation. Miscommunications and pushed deadlines are much less likely when companies implement workflow. The automation technology in PaperVision® WorkFlow is infinitely flexible and can be customized to streamline virtually any business process. Rather than forcing the organization to change to accommodate a preconfigured process, we can flex our product to suit automation of any process according to the way your customer wants it done.



Once your customers have established a productive workflow, they can add RPA solutions that can enhance automation through the use of bots who work without interruption and significantly reduce ongoing expenses for organizations. The benefits of RPA adoption are significant; payback was reported at less than 12 months, with an average 20% of full-time-equivalent (FTE) capacity provided by bots—and this RPA continues to meet and exceed expectations across multiple dimensions including cost reduction (59%) and improved productivity (86%).²⁶

Case Study: Homesteaders Life Company

Homesteaders Life Company is the nation's leading pre-need insurance funding provider, offering funeral planning solutions to more than 3,000 funeral homes in 44 states. In 2010, it generated approximately \$425 million in revenue with nearly \$2 billion in assets. Their sizeable success amounted to thousands of paper insurance policies stored on microfilm, which slowed customer service and created inefficient business processes. After implementing PaperVision Capture, PaperVision Enterprise, and PaperVision Enterprise WorkFlow, they were able to digitize their files and automate the search and retrieval of all information, which immediately generated huge productivity savings. The organization recognizes the following measurable benefits from the implementation:



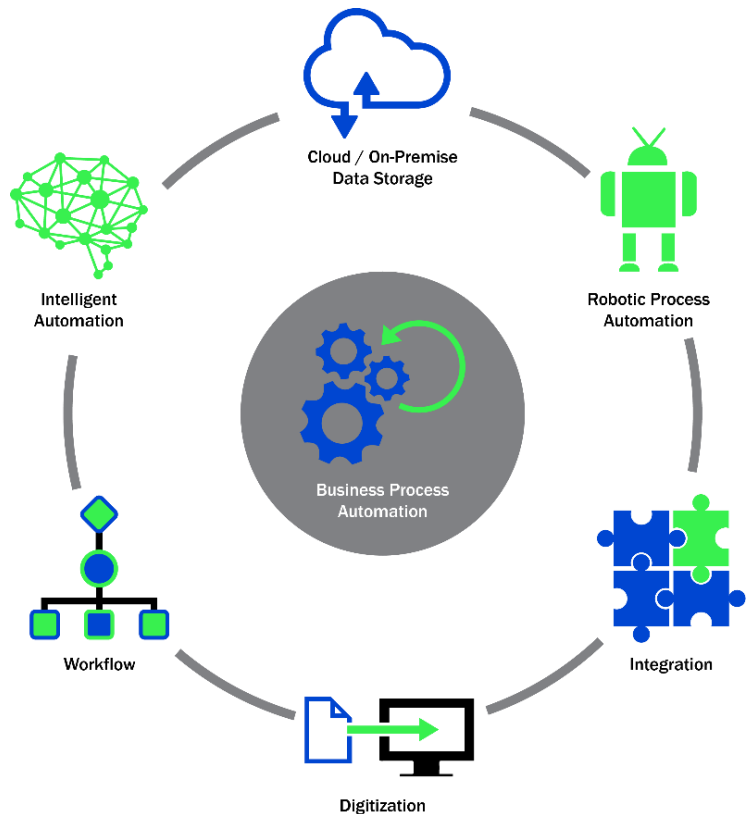
- Streamlined document processing saves hundreds of hours of productivity
- Digitization makes critical data more secure and better protects client information
- ECM automation saved \$62,800 annually in personnel costs, postage expenses and reallocated salaries

“Employees do minimal data entry because key index values are automatically populated from an external database. Thanks to PaperVision® WorkFlow, document processing times have been decreased, saving 100 hours of productivity each year.”

Carolyn Strawn
Manager of Imaging and New Business, Homesteaders Life Company

Customizing Document Lifecycles

Sometimes companies will only go as far as digitization in their process automation journey. This is because digitizing files is straightforward; automating unique document lifecycles for various business processes offers even more benefits. Some software can only recognize pre-programmed templates of business processes; for example, there is a standard process created for every AP or HR department, which is difficult to customize. Although this automates a process, it doesn't necessarily solve a problem or meet a specific need. It's important to recognize that, although there is a standard, processes vary by industry, company, department, and team preference. Unlike these options, Digitech Systems' product suite is highly customizable, allowing you to meet more complex customer requirements.



Case Study: Casey Associates, Inc.

Founded in 1984, Casey Associates Inc. are experts in installing ECM systems and providing scanning and digital mailroom outsourcing services to automate processes for their clients. They became a Digitech Systems reseller in 2003, because they wanted to expand business with advanced technology solutions to keep up with competitors and the evolving customer demands. Since implementing the product suite, they have been able to leverage advances in technology, like IA, to expand their offerings to include more than just scanning services. They have almost eliminated manual data entry not only for themselves but also for their clients, specifically to enhance AP business processes. The organization recognizes the following benefits:



- Forms Magic's IA technology eliminated manual data entry, which increased productivity
- Process automation saved on labor, and improved data accuracy by reducing human error
- Helped any sized enterprise streamline processes and save over hundreds of thousands of dollars every year
- Users require little to no training reducing implementation times

"We lost one of our best operators, but thanks to PaperVision® Forms Magic, I didn't have to find a replacement for her. The system automatically verifies the data now and that has saved us over 300 hours in overtime plus \$30,000 a year in salary."

Mark Casey
Owner, Casey Associates Inc.

Human Error and Compliance with Regulations

The beauty of process automation is that it puts an end to mundane tasks, like document sorting and hand-keyed data entry, which means your customers' employees no longer dread hours of repetitive efforts. More importantly, automating manual tasks eliminates time spent reconciling any human errors. When tasks are completed manually, human errors are inevitable, so why would your customers spend time and resources on fixing mistakes when they can eliminate them altogether? RPA improves quality and accuracy of information



by 90%,²⁷ and BPA empowers organizations by managing entire business activities efficiently, reducing human error and making it adaptable to environmental change.²⁸ Implementing these process automation solutions is a no brainer, especially when they can also enhance compliance (92%)²⁹ because it improves control of information and regulations by tracking who accesses what information and why. As a Digitech Systems reseller, you can help reduce these operational hassles for your customers, without changing the underlying structure of their organization. While efficiently digitizing files with PaperVision Capture, your customers can enjoy the benefits of Forms Magic's IA capabilities that recognizes each document as a human eye would, but with consistent accuracy, faster processing times, and completely safe and secure methods for critical information.

These automation solutions eliminate human error to improve information accuracy, leading to more correct statistics and planning, ease of compliance, more effective decisions, and a better worker and customer experience.

Matching Features to Customer Needs

The table below matches process automation goals with Digitech Systems' product suite's key features and benefits. It will help you build better sales demonstrations, since you can show features critical to solving your prospect's specific needs. In addition, you'll be better equipped to answer common questions for prospects as you familiarize yourself with the content of the table.

Process Automation Goal	Feature	Advantage/Benefit
Digitization	PaperVision Capture Convert paper records to electronic documents	Manage electronic documents to enhance productivity and cut costs on paper, postage, storage and distribution

Process Automation Goal	Feature	Advantage/Benefit
Indexing	<p>PaperVision Capture & PaperVision Forms Magic Technology</p> <p>IA algorithms: Advanced document recognition software that identifies document type, characters, patterns, images, etc. and sorts them accordingly. Also, extracts critical data to populate fields and share with other LOB applications</p>	<p>Automatically scan and index documents containing handwriting, machine print and barcodes</p> <p>Automate document capture, uploading and indexing with a press of a button</p> <p>Improve information accuracy and control of critical documents</p>
Routing and Workflow	<p>PaperVision Enterprise WorkFlow</p> <p>Connectivity, Transparency, and Collaboration</p> <p>PaperVision Enterprise WorkFlow</p>	<p>Automating business processes improves employee productivity and effectiveness</p> <p>Eliminates delay in processing, saving money on fees and fines</p> <p>Automate document-driven processes and enforce procedural steps such as automatically retrieving and sending documents in a desk-to-desk basis across an enterprise</p> <p>Instantly see the status of any document and where it is in the process, making information accessible from anywhere, anytime to increase productivity</p>
Compliance with Regulations	<p>PaperVision Enterprise</p> <p>ImageSilo</p>	<p>Advanced reporting features provide an audit trail, showing who has viewed documents, and when and why</p>

Process Automation Goal	Feature	Advantage/Benefit
Storage and Retrieval	PaperVision Enterprise	Keyword and full-text search to locate files in seconds to reduce turnaround time and accelerate customer service
	ImageSilo	Automatically index and store digital reports, reducing distribution costs and eliminating the need for paper storage
Integrate systems to share information	PaperVision® Automation Manager (PAM)	Advanced automation that eliminates manual entry and coordinates data between systems
	PaperVision® Integration Manager (PIM)	Automatically integrate information between any LOB applications, and/or integrate any existing application with Digitech Systems software applications

Ask for Help

If you're still feeling a little intimidated by this process automation market and technology, Digitech Systems can help! Our sales people are available to assist you with demonstrations of the process automation technology. They can help you figure out how the technology's capabilities match up to your customer's needs, and they will help you customize a presentation specific to your prospect's environment, improving your chances of winning the business. Best of all, our sales people are also familiar with all of the marketing materials available to help you not only explain but also sell this exciting technology to your customers. These materials include all of the following items. If you want help understanding what is available and how to use it, contact your CDM today.

- **Graphics and visuals** – Drop these materials directly into your website or other marketing materials and campaigns.
- [Slides](#) – Check MyDSI to access a set of pre-built slides available for you to customize into your own sales presentation.
- [Case Studies](#) – Keep your eyes open as we publish more new stories about how process automation technology is solving real customer problems.
- **RPA Infographic** – This visual explanation of how RPA bots, like PAM, solve problems. This makes a great leave behind after a sales call and will garner leads when used as click-through content for your website.
- **RPA E-Book** – If you're still unsure about process automation capabilities, this e-book will visually summarize all the things you need to know!

- **Do You Need Automation? Flow Chart** – This chart will help you navigate which process automation tool your customer needs to solve a specific paper problem
- **Automation Timeline** – Trying to understand the development of process automation and want to ensure customers their future with this technology is bright? Take a glimpse at this process automation timeline and realize the employment potential AI and IA bring to the market.
- [PaperVision Forms Magic Technology Infographic](#) –A great tradeshow giveaway. #infographic is one of the most attention-grabbing hashtags on Twitter these days!

Spotting Opportunities

Some of our resellers have been asking how to find prospects and opportunities. One of the best resources you have is your existing customer base. We recommend you start with their business, because you already have a strong, trusting relationship in place. Try sending an email campaign that invites these customers to consider how they would answer one of the following questions:

- What areas of your businesses are still affected by physically managing paper?
- Are you still hand-keying index information in PaperVision Capture?
- Does a difficulty in sorting or searching for information ever delay processes and decisions?
- Do you receive most of your invoices in paper form? Are they difficult to sort and extract the data needed to pay?
- Are your onsite workers pained by multiple trips made to and from main offices for form pick-up or delivery?

Or, begin a telemarketing or social media campaign that explains how process automation is already benefitting other users. Key target areas for this technology include: Accounts Payable (AP) or claims processing, since both involve a significant amount of paper-based information; as well as HR (specifically for on-boarding), and manufacturing companies. You have a unique opportunity to put your customer's information management solutions at the cutting edge of software with our process automation technology. Help them get ahead of their competitors through faster processes, more secure data management, and more cost savings than ever before! Check MyDSI for additional tools to help you get started marketing and selling our product suite immediately.

Digitech Systems Professional Services will assist with the implementation of an entire product suite of content management products. They will provide a Statement of Work along with detailed analysis of the costs associated with your project. With their help, you're assured of a successful implementation that helps solve even the most complex data challenge. You'll look like a genius, and business will boom. Visit www.digitechps.com to learn more.

Conclusion

If your customers are still adding up hours and costs manually managing their documents, make sure they understand the benefits of process automation you can offer as a Digitech Systems' reseller. From digitizing files with PaperVision Capture and indexing with Forms Magic IA technology, through file storage and retrieval with ImageSilo and PaperVision Enterprise, to data storage and automatic routing and task notifications with PaperVision®WorkFlow and RPA bots, your customers have the opportunity to invest in a fully customizable, comprehensive process automation solution. The benefits are undeniable!

With the automation market in the trillions, companies are ready to spend money on process automation to reduce processing times and save money on labor and storage costs. Your customers

will thank you for providing a comprehensive solution that's easy to setup for any-sized enterprise. Rather than selling a single component, you will see significant growth if you combine automation technologies into business process solutions for your prospects and existing customers. Process automation instantly increases the size of every sale, and since automation technology works instantly and takes zero breaks, solving your prospects' business problems. Growing your business won't take any time at all!

Additional Resources

There are a lot more opportunities to learn about the process automation industry! Take advantage of the resources below to answer your questions and provide additional guidance.

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

www.digitechsystems.com/you-inc/processautomation/

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.

<http://www.aiim.org/community/capture>

Nucleus Research

To read more research that provides ROI, insight, benchmarks, and facts to understand the value of technology in order to make informed decisions, check out Nucleus Research!

<https://nucleusresearch.com/>

Keypoint Intelligence – Buyer’s Laboratory (BLI)

For more than 50 years, Buyer’s Laboratory has been the world’s leading independent product evaluator specializing in the ECM and imaging industries, and their product analysts recently performed a thorough evaluation of PaperVision Capture, including the [artificial intelligence](#) (AI) engine, [PaperVision® Forms Magic](#). Read more about BLI reports on effective business solutions like Digitech Systems’ [Outstanding Data Capture and Workflow Solution for 2019](#).

<https://www.keypointintelligence.com/>

Vocabulary and Terminology

Business Process Automation (BPA)

The use of technology (such as workflow, RPA, and IA) to automate business processes. Includes the routing of information from step to step and automatic processing of tasks. Sometimes called workflow, Business Process Optimization (BPO), and Business Process Management (BPM).

Business Process Model & Notation

A graphical representation of a business process. A flow diagram or flow chart.

Cognitive RPA

The use of Artificial Intelligence to enhance RPA.

Digitization

Converting a paper document into an electronic format for the purpose of streamlining or automating company processes and to simplify security and retention.

Integration

Additional software code that enables two or more applications to share information back and forth and potentially to share capabilities within a business environment. Often provided by professional services agreement as part of a custom installation.

Intelligent Automation (IA)

The automation of variable business processes with structured, semi-structured, or unstructured data to facilitate sharing of information between applications and to process information. Encompasses RPA and workflow and adds the use of artificial intelligence technologies such as natural language processing (NLP) and machine learning.

Organizational Transformation

The use of technology to enhance and streamline business processes to create significant value, typically involves automation of tasks.

Robotic Process Automation (RPA)

The automation of rules-based processes with structured data to facilitate sharing of information between applications. The systems are accessed by a user account controlled by a “bot.”

Also called simple automation.

Workflow

Automate routing of information through business processes.

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