SEE THE FOREST:

A BIRD'S EYE VIEW OF INTELLIGENT AUTOMATION IN PRACTICE

Find out how organizations like yours have used intelligent automation as a catalyst for growth and to gain a competitive edge
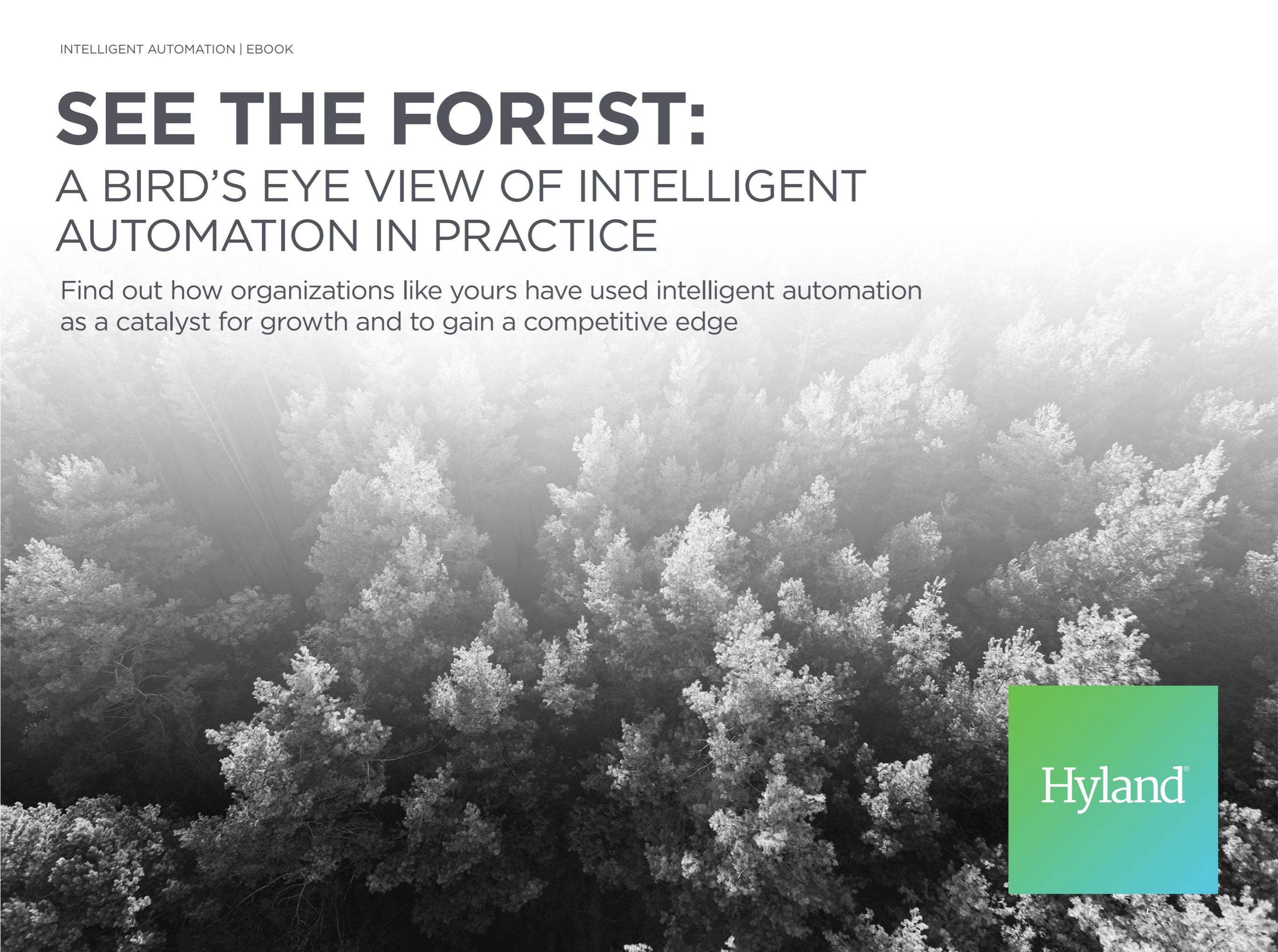
Hyland®

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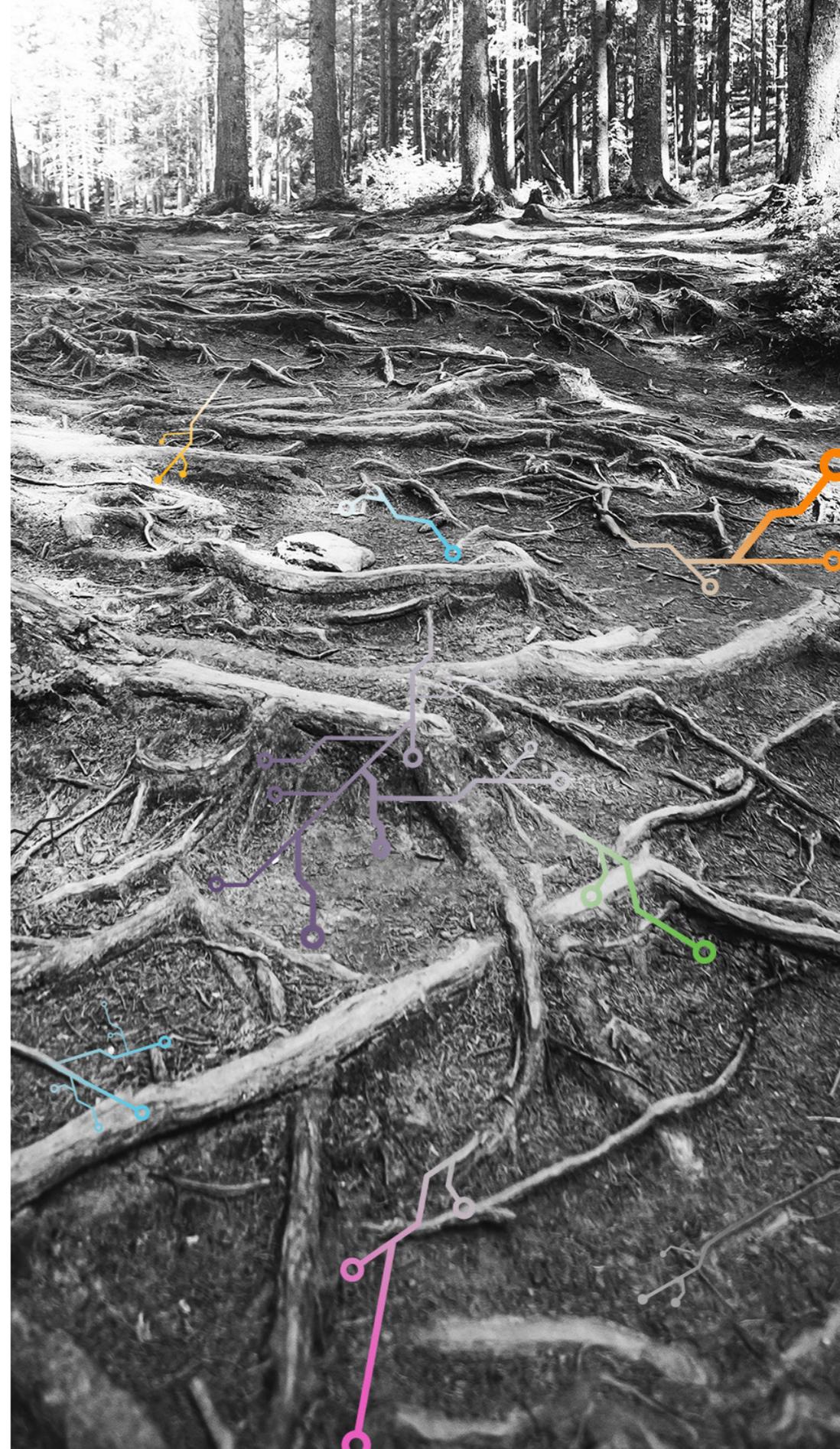
Introduction

There's a phrase that goes, *you can't see the forest for the trees*.

It's a great thought when it comes to staying competitive in today's fast-paced, digitally-driven market. When organizations are entrenched in outdated systems, keeping up with manual processing of documents and information is the overwhelming priority.

And gaining a clear perspective on why you should reevaluate your processes and consider incorporating intelligent automation (IA) into an overall digital transformation strategy can seem impossible.

In other words, when you're standing in the middle of a dense forest, all you can see is what's right in front of you. And's that's probably just more trees.

In this ebook, we're going to fly to the top of the forest canopy to get a view of some critical IA capabilities, as well as how smart strategies play into implementing those technologies. Through analyst insights and case studies, you'll see real-world examples of IA success from organizations across industries.

IA TECHNOLOGIES COVERED INCLUDE:

Intelligent capture   **Workflow automation**   **Case management**   **Customer communications management**

THE STUDY

Sponsored by Hyland, IDC's 2019 eBook, "Drive Business Value with Intelligent Automation," provides data collected from Hyland customers, and IDC research, including: - IDC Global Digital Transformation Leaders Survey, June 2018 - IDC Future of Work Survey, November 2018 - IDC MaturityScape Benchmark – Content Centric Workflow Survey, July 2018 - IDC Content Workflow Automation Survey, June 2017 - IDC Managing Enterprise Content User Needs & Strategies Survey, June 2017

Future workspace: Provides access to content and content-centric workflows at any time, from any place, enabling secure collaboration. "Intelligent automation is a key component of the future workspace," according to IDC's study.

Work transformation (WX): A key component of digital transformation that aims to create an employee experience-focused culture using intelligent automation to drive initiatives.

Use of IA capabilities is blossoming

76%

of IDC study respondents from transforming organizations said they had deployed intelligent enterprise capture and used it to engineer efficient, automated workflows

75%

of mature organizations have deployed workflow design and orchestration technologies enterprise-wide

72%

of the most mature organizations have deployed automated document generation technology
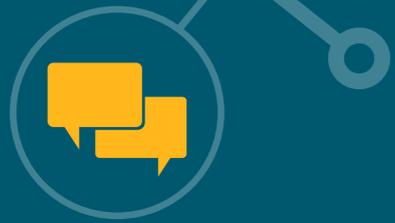
Customer communications management

Customer communications management (CCM) lets you automatically create and distribute personalized correspondence and customized documentation in a variety of formats to all the people you serve in an efficient, cost-effective and consistent way. According to IDC, 72 percent of the most mature organizations in their study have implemented some form of automated document generation technology.

Forty-four percent of respondents to the IDC study said engagement with customers and partners was a top driver of work transformation, which aims to create an employee-experience focused culture using intelligent automation to drive initiatives. IDC explains that "work transformation is a key component of digital transformation and integrally related to customer experience and operational excellence."

As more and more organizations incorporate a vision for work transformation into their digital transformation strategies, employees will begin to take on more strategic, customer-facing roles within their organizations. With CCM technology in place, they'll have a powerful tool for communication at their fingertips.

"It's pretty amazing. Content Composer processes thousands of documents in just a few minutes. It's very impressive, and it's essentially changed our entire batch process."

Casey Greenwood
IT Supervisor
Montana Department of Labor and Industry

GOVERNMENT: STATE OF MONTANA'S DEPARTMENT OF LABOR AND INDUSTRY

Within the unemployment insurance division, hundreds to thousands of documents are distributed to residents daily, including payments and related items. As a result, in addition to the user-driven mail merge that takes place, an automated mail merge also processes notices every night. Content Composer has sped up this batch process exponentially.

"Our previous automated merge process literally took hours to perform every night. It was extremely slow," Greenwood said. "With Content Composer, these notices — and we're talking anywhere from 2,000 to 3,000 at a time — get finished in a matter of minutes. It's that fast. We went from waiting hours to get it done to waiting 10 to 15 minutes, tops."

With the previous process, an on-call programmer was needed to monitor the automated mail merge and related processes all night. Now, the entire process takes about 45 minutes.

Read the full case study >

Case management

Case management solutions let you manage data, tasks, activities, correspondence and events surrounding unstructured cases and knowledge-driven work, so employees can make better decisions and provide exceptional customer service.

According to a 2019 whitepaper from research firm Ovum, "case management solutions require more than simply process automation and document management capabilities. Knowledge-based work requires that case management solutions also support higher-order tasks, such as collaborative decision-making, and the ability to create and manage complex or ad hoc tasks and approval processes."

In this section, we'll find out how two very different organizations used the OnBase enterprise information platform to transform case management, providing more transparency into customer relationships, while increasing accuracy and efficiency.

"Across all industries, there was consistency in the highest case management priority (77%) being "to improve employee productivity and efficiency."

- Ovum: Gaining the Best Business Value from Case Management, 2019

A 360-degree view of client relationships and supporting information enables managers, VPs and executives at Functional Pathways to make better decisions and take actions required to retain valuable business partnerships.

HEALTHCARE: FUNCTIONAL PATHWAYS

Before OnBase, Functional Pathways had limited visibility into client relationships, with staff tracking activities in shared Excel spreadsheets. "That method was static," said Kellie Buchanan, vice president of client retention. "There was no automation, the information wasn't connected to anything else we were doing, and it left out any ability to prompt key activities that needed to happen."

OnBase provides Functional Pathways with automatic notifications of required tasks and built-in reporting functionality to improve productivity and visibility. "I can instantly pull a report that shows me who is overdue on their quarterly meetings or other key activities," said Buchanan. "This allows me to follow up and ensure that any gaps in client communication don't linger and damage the relationship."

Read the full case study >

> "There's so much more to OnBase than making the documents electronic. The solution has provided so many opportunities for us, and the reporting mechanism has been fabulous."
>
> **Elly Brenner**
> Assistant Dean of First Year Studies
> University of Notre Dame

HIGHER EDUCATION: UNIVERSITY OF NOTRE DAME

With OnBase, advisors access all first-year student information and related content in a digital student file solution, including admissions documents and real-time data pulled from the Banner by Ellucian student information system (SIS). With this complete view of each student, OnBase equips advisors to provide better service and maintain more relevant relationships with students.

"Advisors now have one place to go for all student information," said Tracy Weber, manager of digital document management. "While students are in the waiting room, advisors can pull up their electronic files, see their pictures and view details like FERPA status, academic schedules, grades and pending course drops. They also have access to all related documents — giving them a quick synopsis of each student."

From the same interface, advisors add visit notes, attach supporting documents, email professors and manage change of intent and declaration of program events. Additionally, they easily see assigned tasks and upcoming appointments, allowing them to better manage and prioritize their work. Native security controls protect advising notes and sensitive student information, while an audit trail of all interactions with files supports the security and integrity of student files.

OnBase also offers insight into trends like frequent drops for a particular course, equipping the department to take action to protect the critical first-year student experience. This added visibility brings notable process enhancements. "We finished processing course drops three days earlier than we have in the past, so it's a huge increase in efficiency," said Brenner.

Read the full case study >
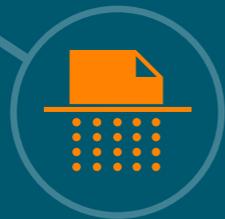
Intelligent capture

Seventy-six percent of transforming organizations in IDC's study deployed and use intelligent enterprise capture to engineer automated workflows that help increase efficiency. In fact, intelligent capture allows organizations to leverage multi-channel capture for all types of content with intelligent automation to classify, extract and validate critical incoming information.

With better automation of tasks like manual data entry that used to take up the majority of a worker's time, employees are now freed up to tackle more strategic work, like spending more time interacting with customers.

Let's take a look at how two organizations are using intelligent capture to boost productivity, increase accuracy and improve customer service.

"It's important to note that the goal of AI-driven data capture isn't to replace humans, but to drive as much automation as possible with machines that can intelligently carry out tasks. Ultimately, employees are freed from being bogged down by mundane tasks and can take on high-value tasks that require a human mind to do well."

- Article: Artificial intelligence and data capture, a necessary marriage for business growth

COMMERCIAL: OLD DOMINION FREIGHT LINE

Old Dominion Freight Line (ODFL), a leading less-than-truckload super regional carrier, uses Brainware for Remittance to drive greater value and efficiency in accounts receivable (AR). As a result, accounts receivable boosted its productivity by 400-500 percent, from processing 400 to 2,000 remittances in an hour. The remittance documents are exported into the system where the information is validated against known data sources in AS400 and SAP.

Achieving accurate data capture

ODFL not only surpassed its productivity goal, the organization now has unparalleled control of working capital and is able to gain immediate visibility into cash inflow in real time. This helps the company better manage cash position, and also improves customer service.

Accuracy and accountability are critical in the trucking industry because any customer's shipment might be flagged and delayed due to late payment of their previous bills. Because the new solution extracts remittance and payment information as soon as it enters the business, these delinquent accounts can be cleared at the earliest possible moment, releasing their shipment. This earns ODFL additional revenue sooner, and helps maintain their exemplary customer service.

Improving efficiency

"As a result of all the automation that we've deployed, we're using the same number of staff members in accounts receivable today as a $1.5 billion company (approximate 2010 revenues), as we did as a $200 million company, so it really has performed well," reports Ken Erdner, ODFL vice president of information technology. "Our continuous improvement in this area is obviously driven by several initiatives, but this solution is a key element of keeping our AR staff at an effective and efficient level.

Read the full case study >

"We're getting four to five times the productivity [with Brainware] that we had with what we thought was a good manual system."

Ken Erdner
Vice President of Information Technology
Old Dominion Freight Line

> "You don't have many opportunities in your career to implement significant change. With the procurement of the Perceptive Intelligent Capture solution... this change will position us for the future, in accounts payable, to contribute even more directly to the mission of Presence Health."

Robert Banwart
Director of Accounts Payable
Presence Health

HEALTHCARE: PRESENCE HEALTH

Presence Health saw a rapid, substantial boost in efficiency and productivity upon implementing Brainware, Hyland's intelligent capture platform. Robert Banwart, director of accounts payable for Presence Health, notes their accounts payable operation is achieving field extraction rates of 94 percent on PO-based invoices, and in the first year reduced paper-based processing from 87 percent down to 10 percent.

"As a result of the Brainware intelligent capture implementation, we have been able to reduce the hourly staff actually entering data into the system by about 40 percent. We have also been able to achieve other benefits that affect the bottom line. We now have the ability to greatly expand the number of vendors that we work with to obtain prompt payment discounts.

That effort would not be possible, nearly to the extent that we're now seeing, without the Brainware intelligent capture solution. On our purchase-order related invoices, what we're finding is about 45 percent of those transactions are able to go through the verification process without our intervention, and about 75 percent of the transactions were able to have the software match automatically — the line items on the invoice to the line items on the purchase order. Those percentages are significant reductions in key punching that we have to do within accounts payable."

Read the full case study >
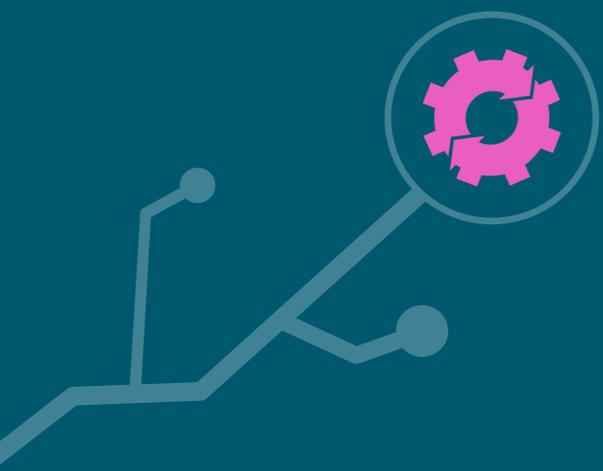
Workflow

Workflow automation lets organizations automate tasks, route documents, manage exceptions and extend key processes using tools like built-in rules and actions, and customizable forms. With 75 percent of transforming organizations in IDC's study having deployed workflow design and orchestration technologies enterprise-wide, it's clear this component of intelligent automation is a proven winner.

In fact, the study highlights, "the IT department of a U.S. state government deployed content workflow solutions to automate accounts payable, requisitions, and purchasing processes. The department saved an average of 350 hours per month, equating to estimated annual savings of $140,591."

The following organizations have used OnBase workflow automation to achieve quick response times to customers and ensure compliance with regulations.

GOVERNMENT: MARION COUNTY HEALTH DEPARTMENT

Documents come in to the Marion County Health Department (MCHD) in a variety of ways, but all of them can be managed by OnBase. For example, birth data is received electronically from hospitals, and a corresponding paper Certificate of Live Birth is mailed from the hospital. The paper document is batch-scanned into OnBase and then automatically matched with the birth data for indexing. Regardless of how the documents became part of the OnBase repository, they can be retrieved immediately using keyword searches and cross referenced with related documents. Cross referencing allows a user to double click on one document, such as a birth certificate, and automatically retrieve a related one, such as a death certificate or paternity affidavit.

After reviewing death certificates and burial transit permits brought to the office by funeral directors, a clerk will provide certified copies immediately. Using OnBase document imaging and workflow, the certificates are scanned into the system. Appropriate indexing values are retrieved from a death data entry system. Data entry clerks complete any missing fields, verify and conduct quality assurance on the images and corresponding index fields. MCHD will generally accomplish all of this within the first two hours of every morning, meaning that a death certificate received on Monday will be in the system no later than 10 a.m. Tuesday.

Initially, walk-in applications for documents, such as birth certificates, were filled out by hand, scanned and destroyed the following day. While an improvement over the previous system, it still generated a lot of paper and sometimes the images were illegible.

Now, an intake clerk creates an e-form cover page that kicks off a workflow and keeps the related documents together. The clerk interactively completes the form with the customer and verifies their identity. The customer can sign the application using an electronic signature pad. Accompanied by the cover sheet, the forms then transition to the cashier work queue for completion.

By the time the verification process is complete, the cashier is waiting with the requested document with the seal affixed and the fees calculated, reducing wait times from hours to minutes. For accountability purposes, the application itself is stored in OnBase, which also provides an audit trail and document history for every document in the system.

Read the full case study >

> "I love to amaze the community with the speed, accuracy and responsiveness of our agency and see people go away happy."
>
> **Julie Bishop**
> Administrator of Vital Statistics
> Marion County Health Department

> "With the ability to easily create workflows and get help complying with regulations, our return on investment is immeasurable."

Wanda Chambers
Senior Vice President
Payment Services

FINANCIAL SERVICES: SUNCOAST CREDIT UNION

Behind the scenes, more than 150 workflows keep things moving by automatically forwarding information and documents through processes, notifying the right people as required.

A great example is the process Suncoast used to automate domestic and international wire transfers. Instead of relying on paper, now branches and the call center manage member requests for wires with electronic forms that initiate OnBase workflows. The workflows then automatically notify the Electronic Funds Transfer (EFT) department, reducing processing time from one hour to three minutes.

To make sure important information is easily shared across departments, Suncoast integrated the OnBase wire workflows with Summit core and FedLine Direct. The automated process pulls history from the core and stores all related information as part of the wire record. Built-in rules for levels of approval alert the appropriate people should a wire exceed the back-office limit, keeping the process moving quickly and accurately.

Read the full case study >

See what's on the horizon

Soaring above the forest canopy has given you a sense of the breadth of intelligent automation capabilities and their benefits. You can touch down now, right?

Not so fast. No discussion of intelligent automation is complete without considering what's on the horizon — the future workspace. The ways in which organizations, employees and customers access and use information has drastically changed and will continue to change with the evolving technology landscape.

To keep up, businesses are proactively strategizing ways to provide workers with the flexibility, collaboration and security to do their jobs happily and well, while serving customers with better information and faster responses. The IDC eBook explains, "work transformation is a key component of DX (digital transformation), and integrally related to customer experience and operational excellence."

IDC's future workspace, with its content-centric workflows, 24/7 information access and secure collaboration, are made possible by the complete view of information gained when organizations not only implement intelligent solutions, but when they also apply intelligent problem-solving to meet the future of business head-on.

"This application takes the phrase 'your information finds you' to heart, alerting the knowledge worker at the moment they have to do the work."

Sean Lemon
National Project Manager
Universal Forest Products

MANUFACTURING: UNIVERSAL FOREST PRODUCTS

With business applications built on OnBase, employees have one place to go to access information and drive processes. Business units also leverage the spectrum of OnBase capabilities — including electronic forms and workflow automation — to streamline processes from start to finish.

In addition to automating predictable process steps, OnBase equips Universal Forest Products' business users with the complete view they need to handle knowledge-driven work — providing access to all data and documents from one intuitive interface. The system also sends employees automatic email notifications with instructions on when and how to complete tasks, as well as links to associated forms.

Read the full case study >

Hyland®

Ready to learn more about intelligent automation and the future of work?

Read IDC's eBook now >