

White Paper

It's a web world. Why web capture is evolving.



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Web-based capture will be a game changer for growth and survival.

This is the age of the web. The Internet is like electricity. It can drive really powerful solutions. With technology advances in cloud, mobile and social, the paradigm shifts in information management have and are moving fast - to the web. The advantages are huge.

Even if each business context is different, web-based capture and browser-based capture solutions offer so many benefits. Given the challenges of today's business environment it offers exciting opportunities for game changing growth.

The volume of incoming data is unrelenting in paper and electronic inputs. Just how can a business expect to keep up with it all? Even the most advanced organizations find it difficult.

The quest is for simple capture that is easy to deploy and use throughout the organization. Plus, streamlined processes are needed that speed input and information access. In essence, businesses are looking for proven, thick client capabilities with thin client benefits*.

This white paper identifies the five big challenges that organizations are facing and explores how the implementation of web-based capture can be a game changer in mastering the processing of large amounts of documents.

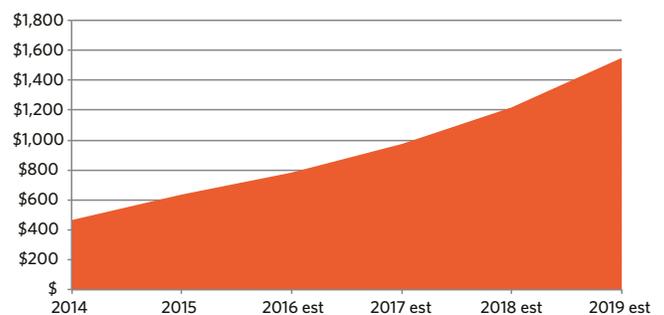
To meet these high customer expectations, companies ... must reinvent the entire business process, including cutting the number of steps required, reducing the number of documents, developing automated decision making, and dealing with regulatory and fraud issues.

McKinsey, Accelerating the digitization of business processes, 2014

* Thin Client: the term describes a client machine that relies on the server to perform data processing. Either a dedicated thin client terminal or regular PC with thin client software is used to send keyboard/mouse input to the server and receive screen input in return. It does not process any data, it processes only the user interface.

Thick Client: the term describes full-featured computers that are connected to a network. Unlike thin clients, which lack hard drives and other features, thick clients are functional whether they are connected to a network or not. The server may provide the thick client with programs and files not stored on the local machine's hard drive.

Capture Software Market Value associated with Web Capture*



*Global market value incl. licenses, maintenance and prof. services based on HSA market assessment

Harvey Spencer Associates expect a significant uptake of web based document capture. Apart from maybe small desktop scanning, organizations will look to move forward with thin client scanning solutions using HTML5.

Five big challenges

1. How do we make business processes faster & smarter?
2. How do we get complete connectivity across our business?
3. How do we prevent fraud & meet compliance needs?
4. How do we control costs, still invest & innovate to stay ahead?
5. How do we use information to better engage customers & drive loyalty?

From major hurdle to powerful asset.

More data, paper everywhere. We continue to see a relentless rise in the volumes of information, with increasing communication channels deluging organizations. Despite the expanding diversity of incoming information, many businesses are still largely dependent on paper-based inputs despite attempts to shift to paperless processes.

Paper is a major hurdle in unlocking the power of documents. Extracting content is laborious and time consuming for staff. Manual extraction of data can result in errors, missing or overlooked information, and slow and inefficient business processes. Plus it puts cost pressure on meeting profitability goals.

Then of course, there are your customers who want their request to be answered immediately and accurately. If the customer-facing staff need to send the documentation to be processed after the customer visit, this may result in follow-up questions and requests for additional documentation. In brief: a long and frustrating process, which impacts customer loyalty. That can be good news for your competition, not so good for you.

Transactions that are fully or partially paper-based are also key concerns. Access and document manipulation are particularly difficult to track when they are managed in a manual process.

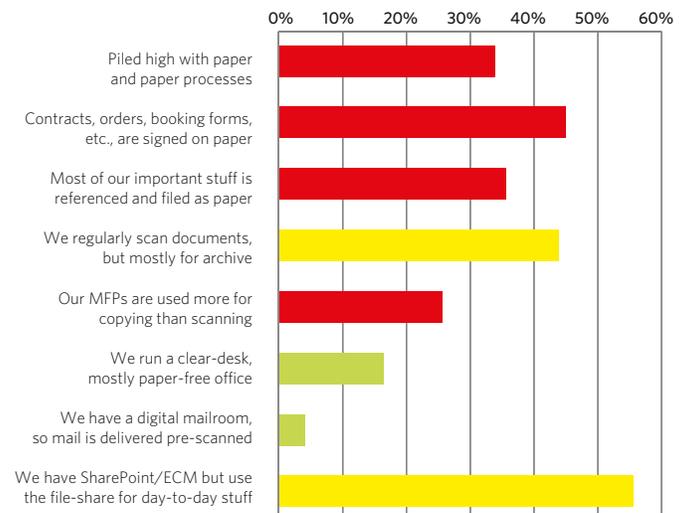
Many businesses have shifted their scanning workflows to capture information wherever it enters the business. However, images of these documents are often just digitally archived. No data is extracted and seamlessly inserted directly into the business process.

Paper is a good place to start thinking about digital transformation, because it is the Achilles heel of most organizations. Paper clogs up processes. Paper creates disruptions to smooth information flows. Digital processes require digital information.

John Mancini,
The big digital transformation, Information Dynamix Blog, 2015
© AIIM 2015, www.aiim.org

Organizations need to be able to extract more value from their information. In today's digital age, intelligent capture technologies and information management is the only way forward.

Which of the following best describes your office or typical offices in your organization?



AIIM, Industry Watch, Paper-Free Progress: measuring outcomes, 2015 © AIIM 2015, www.aiim.org

5 big challenges

1. Streamlining processes

Business Process Automation (BPA) and Business Process Management (BPM) are taking center stage as drivers for competitiveness. This puts information centric business transactions in the spotlight as they are often only partially automated.

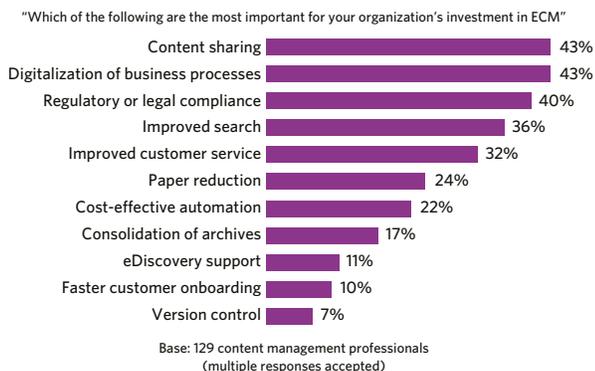
The challenges

Document and data capture can make or break a business. The whole information lifecycle matters. Documents need to be captured quickly and accurately, images and information need to be easy to find, secured, connected with the right business process and quickly turned into actionable outcomes.

Paper is still widely used in organizations, which requires some manual intervention. Or it is processed in a silo'd workflow and is disconnected from electronic documents. This leads to missed opportunities for efficient processing and leveraging the insights they contain. Paper documents are a major obstacle to automate.

Legacy capture processes, such as scan-to-archive, that are not connected to a business process result in missed opportunities to streamline workflows and leverage value. There is a much-needed shift to a scan-to-process approach where the required data for a business transaction is extracted and automatically inserted into a business workflow. Archiving is an element of this workflow, but not the only goal.

Sharing content and digitization of processes top the list of drivers for ECM



Source: Forrester's July 2015 Global Enterprise Content Management Online Survey

The need

- Paper-based documents need to be digitized as early as possible when they arrive in the organization, i.e. remote agent locations and branch office customer interactions
- Your knowledge workers need easy access to a capture solution that offers simplicity of use
- Information required for business processes needs to be identified, automatically extracted and inserted into the relevant business workflow
- Where feasible, documents should be captured into line of business (LOB) applications for seamless processing

The value

From capturing your documents at the point of receipt to final output in your business solutions, web based capture minimizes manual interventions and reduces unnecessary handling. In fact, web based capture can be launched directly from your business application, eliminating any extra work and process steps.

Your business benefits from reduced manual interventions and shorter processing time for handling business transactions and customer inquiries.

Fast, accurate and intelligently integrated capture increases the efficiency of your business processes and value of your business overall.

46%

of organizations consider that the biggest single productivity improvement for most of their business processes is to remove the paper.

John Mancini, The big digital transformation, Information Dynamix Blog, 2015
© AIIM 2015, www.aiim.org

5 big challenges

2. The right connections

In the era of IoT (Internet of Things) everything is becoming hyper-connected. The web and cloud are the facilitators. Information is the glue between business, customers, processes and associated systems. Therefore, to survive and thrive, every business needs to ensure connectivity throughout the enterprise and with external counterparts.

The challenges

Documents arrive in different formats and through different input channels. Paper based documents, those digitized through scanners, Multi-Functional Devices (MFDs) or captured through mobile phones and documents in electronic format are handled in separate workflows.

Our work style is changing fundamentally to mobile and remote, while document capture solutions that are limited to a specific scan location are left behind.

A decentralized scanning solution requires significant complexity to install, deploy updates and administer, with complexity growing with the size of location and diversity of the infrastructure.

For companies with mobile capture projects, speed of data availability and keeping paper out of the process have been the biggest benefits.

AIIM, Industry Watch, Paper-Free Progress: measuring outcomes, 2015
© AIIM 2015, www.aiim.org

The need

- Integrate the processing of electronic documents and those that originate in paper regardless of their input channels (scanners, MFDs, smart devices, and of course, via mobile)
- Seamlessly connect an integrated capture application into web-based business application
- Mobile capture is vital as it aligns with the mobile work style and the need to capture information on the go in today's business world
- Take advantage of the interconnection to centrally deploy, administrate and update capture applications

Take the example of a travelling business executive. In the past, receipts from a business trip would have to be scanned on return, an expense report created, then processed by accounts department before reimbursement.

Using web-based mobile capture technology, an executive can take a photo of each receipt with a smartphone whilst on the road. This can go directly to the accounts department so a reimbursement check can be ready and waiting on return.

This also speeds up the internal process, the company operates more efficiently, the employee is more productive since no scanning is involved, and is happier to get reimbursed much faster.

The value

Your business benefits from seamlessly integrated capture into business applications. Centrally managed web capture opens new dimensions for highly connected document capture.

5 big challenges

3. Protecting for compliance

The protection of information and the ability to meet ever-changing compliance requirements is a top business priority. Requirements are increasing, penalty-free periods for missing requirements without significant fines are coming to an end and fraud is at an all-time high. This makes document security the number one unmet need in information centric businesses and public institutions.

The challenges

Paper and hard copy documents are the weakest element from a security perspective. They can get lost or damaged and open endless possibilities for mishandling or theft.

Not only manual handling and data extraction, but also complicated scanning software applications are error prone if data is misread or entries are incomplete.

Digital documents and data pose many of the same problems if access and handling of documents and data is uncontrolled.

These weak points are no secret to individuals inside and outside the organization who are looking for ways to manipulate documents or put them to fraudulent use.

Regulatory compliance is time-consuming because organizations often need to comply with multiple regulations with different objectives and requirements.... Automation tools and technologies can help organizations accelerate compliance processes.

TechTarget, TechTarget Survey:
IT risk management, compliance top tasks, 2015

The need

- A holistic approach to security and governance starting from where information enters the organization
- Digitize paper right at the source to be able to monitor documents digitally throughout the organization
- Scanning profiles set up and monitored by central IT
- Reduce data entry errors and reworking caused by complicated, difficult to use interfaces
- Establish a complete chain of custody by end-to-end monitoring of access and data manipulation

The value

Centralized management of capture configurations provided by web capture solutions maintain the tight controls necessary for proper business regulation and compliance needs. It also eliminates the delays of cascading mandatory changes and updates throughout your organization.

Your business benefits from tight process controls required to meeting business regulations and compliance needs. It also reduces the increasing cost impact for your business through the ability to detect and prevent fraudulent use of documents.

70%

of organizations are expecting regulators to publish even more regulatory information, with 28% expecting significantly more.

Thomson Reuters, 2016, Top Compliance Trends

5 big challenges

4. Controlling costs

Cost efficiencies are even higher challenges, as businesses need to invest and innovate whilst also meeting goals for lowering operating cost in order to remain competitive or simply stay in business.

The challenges

Business applications are and have been moving to the cloud. Recent trend reports talk about cloud now being the standard for new solutions - no longer just a growing trend. With key software vendors stating plans to discontinue on-premise solutions, this is quickly becoming a reality.

Line of Business (LOB) management benefits from this development as the investment shifts from higher capital investment to lower, ongoing operating cost. Document capture solutions have been left behind.

Scaling is a particular problem. Enabling additional knowledge workers to capture documents becomes a challenge as installation and training time for a capture solution takes up valuable time.

IT cost efficiency is also an ongoing concern. Implementing, upgrading and supporting capture installations quickly become a significant cost item especially in organizations with a large number of locations.

The benefits are huge: by digitizing information-intensive processes, costs can be cut by up to 90 percent and turnaround times improved by several orders of magnitude.

McKinsey, Accelerating the digitization of business processes, 2014

The need

- Reduce software licensing fees
- Protect your investment in hardware
- Reduce implementation and IT upgrade costs incurred by the necessity to travel to all the various locations to deploy software and train staff
- Reduce knowledge worker training and 'down-time' during upgrades
- Seamless integration of browser-based capture integrated into knowledge worker's business application

The value

With thin client capture, your business benefits from reduced operating costs. IT support can be centralized making it easier to deploy, upgrade and administer with substantial savings. The result is higher profitability and Return On Investment (ROI).

Cutting IT costs, resources and time

For example, if a car rental company wanted to start using a new business application or add document scanners to each desktop, that would mean the IT department would have to install new software on each desktop computer in hundreds or even thousands of locations.

Making these manual updates to countless computers is an extremely inefficient use of IT support time. Instead the company could change to web-based applications, which allows employees to download new applications and drivers in just a matter of minutes. This way IT resources are freed up and software updates are to be rolled out within days instead of months.

5 big challenges

5. A better experience

End-to-end customer experience is the top priority for customer satisfaction and loyalty. One bad experience for a prospect or an existing customer may mean that their business is lost, forever.

The challenges

Document centric processes offer particular challenges for customer satisfaction, as they tend to be slow and often disconnected.

For example, documents tied up in back-office processing lead to underwhelming customer service. The customer facing staff lack the information they need to effectively serve the customer.

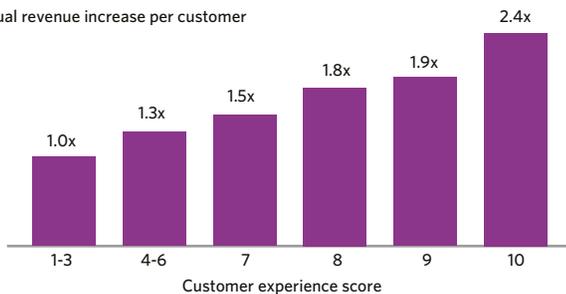
Customers are increasingly using digital communications, face-to-face contact is rare and it becomes even more critical to build relationships in industries such as financial services. In a customer meeting, agents need to focus on these relationships while spending less time on paperwork.

Customers who had the best past experiences spend 140% more compared to those who had the poorest past experience.

Customer experience drives sales

In a transaction-based business sales are driven by good customer experience.

Annual revenue increase per customer



Source Medallia analysis

HBR.ORG

The need

- Distributed capture at the point of receipt ensures the immediate availability and processing of the associated information
- Enabling agents to scan documents during face-to-face customer interactions with high ease of use translates into a quicker, more enjoyable experience for the customer
- Avoid having customers have to wait while applications, requests, claims, etc., are processed
- Seamless integration of paper-based and electronic documentation to process transactions and requests more quickly

The value

Your business benefits from web-based capture leading to increased customer experience as employees focus on customers rather than paperwork. The rewards are high customer satisfaction and increased loyalty.

Take the example of how a mortgage application is processed. A customer presents a mortgage application and documentation to the advisor at the local bank. The expectation is for all the information to be processed right away and go directly to the relevant departments for speedy results and approval. Instead as anyone who has ever secured a mortgage knows, this review period can take weeks.

Web-based capture technology can alleviate the frustration by allowing documents to be immediately scanned and shared with relevant loan offices, resulting in a much happier customer.

Harvard Business Review, The Value of Customer Experience Quantified, 2014

Conclusion:

The pressure is on.

Your challenge is to find a way to operate more efficiently, reduce operating expenses, make information available faster and more intelligently, and allow employees to focus more on customers and improve their loyalty.

So whether you're a Business Manager or head up an IT department, you need capture solutions that are faster, smarter, more productive and more secure.

Five overwhelming benefits of web-based capture overcome five big business challenges.

1. Web-based capture minimizes manual interventions and reduces unnecessary handling
2. Web capture technology opens new dimensions for highly connected document capture
3. Centrally managed capture enhances the ability to protect information and meet compliance needs
4. Thin client capture reduces operating costs, IT costs and helps you stay competitive
5. Increase customer experience and loyalty by focusing on customers rather than paperwork

In every way, the evolution of web-based capture technology is an undeniable game changer for any business sector.

The power that information holds over an organization can be one of transformation as well as one of stagnation. How companies use and leverage their information assets can set them apart from their competitors.

Article by Allison Lloyd
Defining Information Management's Value to the Business, April 2015

Up to 45 percent of all work activities in the United States can be automated right now with current technology.

Article from McKinsey & Company
Automating the insurance industry, January 2016

Future trends.

Think connected life, connected work. Growing web connectivity has and continues to change the way we live, work and communicate in every way. IoT, which started primarily as smart, connected systems and tools in the home is now starting to make a key impact in the business world – resulting in seamless connectivity of systems and devices in a business.

IoT Megatrend

Smart devices producing big data will provide business insight for decision-makers which savvy retailers and manufacturers will harness. Value is created by making sense of data, turning it into knowledge and meaningful action. IoT will enable supply chains to satisfy a growing customer demand for quicker, cheaper, more reliable, more easily delivered, highly configurable goods. It will allow them to tailor their operations to real-time market conditions and deliver high levels of customer excellence.

7.3 billion

Gartner forecasts that 6.4 billion connected things will be in use worldwide in 2016, up 30 percent from 2015, and will reach 20.8 billion by 2020. 7.3 billion devices are expected to be used in business applications.

Gartner, Gartner Says 6.4 Billion Connected “Things” Will Be in Use in 2016, Up 30 Percent From 2015; 2015

The Digital Mesh

This merges real and virtual worlds of data generated by people, processes and devices. It includes mobile devices, wearable, consumer and home electric devices, automotive devices and environmental devices such as IoT sensors.

While devices are increasingly connected to back-end systems through various networks, they have often operated in isolation from one another. As the digital/device mesh evolves, we will see its connection models expand and allow greater cooperative interaction between devices to emerge.

For businesses, it means that any web capture solution they adopt now needs to be sufficiently flexible to accommodate whatever comes on the scene in the future. Web connectivity will keep growing. Organizations need to keep in step with it and take advantage of the opportunities it offers.

While devices are increasingly connected to back-end systems through various networks, they have often operated in isolation from one another. As the device mesh evolves, we expect connection models to expand and greater cooperative interaction between devices to emerge

Gartner, Gartner Identifies the Top 10 Strategic Technology Trends for 2016, October 6, 2015

Want to learn more?

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