Introduction to Workflow Automation

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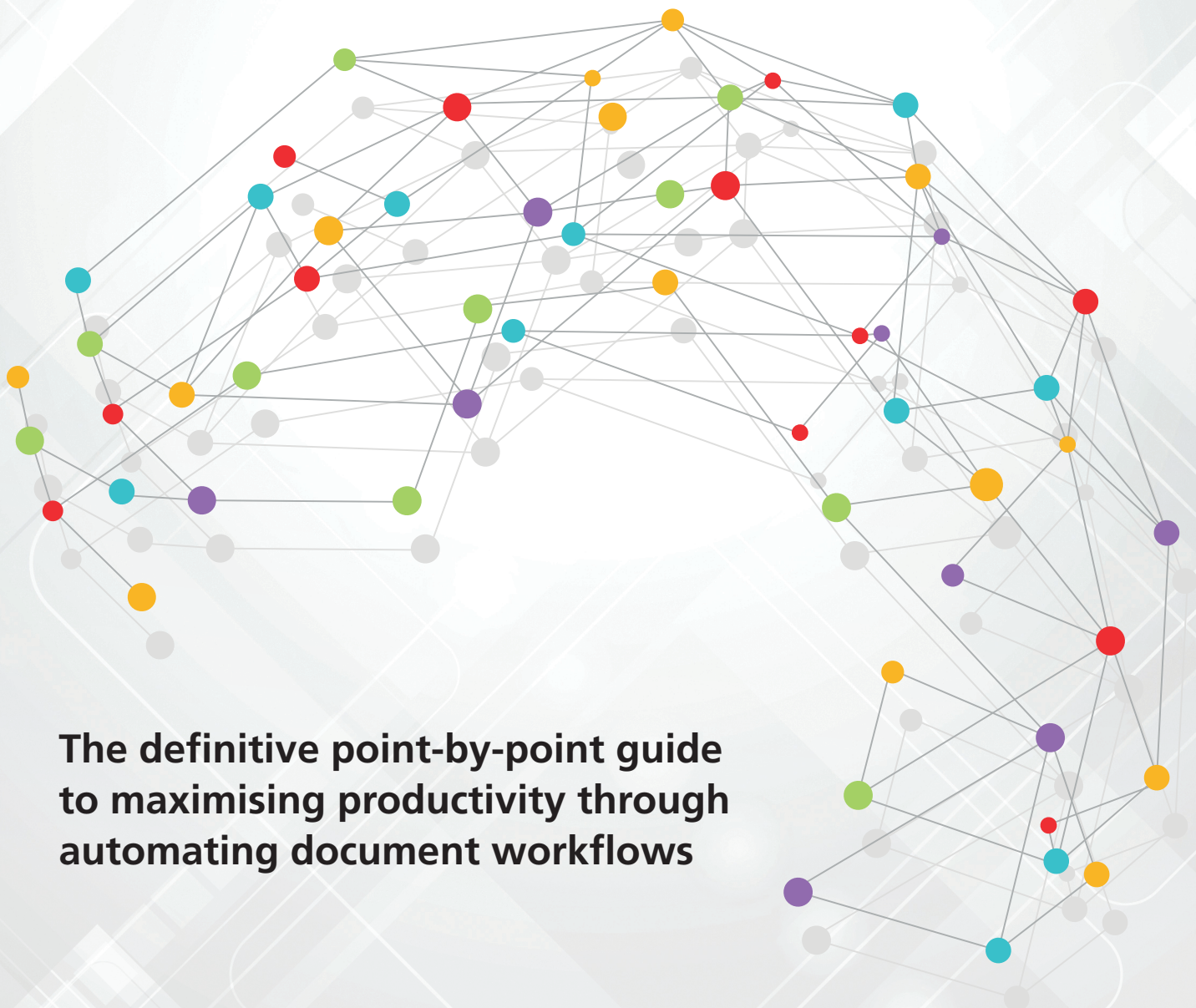
The definitive point-by-point guide to maximising productivity through automating document workflows

Businesses are increasingly taking advantage of digital technology, transforming productivity rates and providing quicker access to new markets. From contacts, claims and correspondence to reports, orders, invoices and service tickets, documents are at the heart of so many business processes. However, the competitive demands of the new world of work require organisations to facilitate anytime, anywhere access to information if they want to secure long-term success. Businesses simply can't meet the operating pace required to succeed with inefficient legacy processes for managing, routing and approving paper documents.

The digitalisation of document intensive processes within an organisation is a fundamental step on the road to digital transformation that all businesses should take. It lays the groundwork for information mobility throughout the business, driving greater speed, accuracy and efficiency, as well as supporting effective collaboration. Many SMBs still send documents like invoices, mortgage and loan applications, or contracts, around their organisation manually. History has proven that this approach inevitably results in lost documents, incomplete data, bottlenecks and missed payments. However, many organisations are afraid of implementing a technological solution to automate and improve these manual processes.

Concerns often include costs, compatibility issues and actual employee adoption rates. The alternative, however, is rapidly becoming far more intimidating. In 2017, research commissioned by Ricoh Europe found that 59% of employees think that better technology would have the most positive impact on their working day. These employees are excited by the prospect of greater speed and flexibility from new technologies: more immediate access to data (44%), a reduction in repetitive tasks (41%) and automation of admin tasks (36%). On top of the productivity cost of slower

processing, missed deadlines and lost files, with the advent of GDPR, manual processes pose a huge cyber security risk. Mishandling data can result in fines of up to €20 million or 4% of a company's global annual turnover under this new regulation.

€20m

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Implementing a consistent and streamlined electronic document management process within or across multiple offices typically includes indexing and archiving data sources. By taking this step, businesses can ensure they remain compliant with regulations and fully auditable. This also reduces the amount of time that staff need to devote to administrative duties, freeing up their time to perform more complex, higher value tasks within the business. 80% of employees cited increasing business process efficiency as a very important factor in driving digitisation, closely followed by ensuring regulatory compliance and reducing operational costs.

Designing leaner, more efficient ways of managing physical documents is an essential task for businesses of all sizes. Large enterprises have scale on their side when it comes to pushing through digital changes and can deploy consultants to manage their investments, extracting maximum value. Smaller businesses however, have the key benefit of increased agility and flexibility. This vital characteristic helps SMBs rapidly take advantage of new technological innovations and respond quickly to market opportunities. Some of the most pressing trends driving business transformation today are customer demands, specifically around increased personalisation.

64%

of consumers believe brands should do more to tailor communications to their individual circumstances

Customers increasingly expect the companies they buy from to interact with them at speed and in a personalised fashion. Automated workflows help businesses to treat customers like individuals.

Our market research has found that 64% of consumers believe brands should do more to tailor communications to their individual circumstances. Workflow tools make sure the right information is automatically available to staff. This helps customer communications and interactions happen in a convenient fashion, driving brand loyalty and repeat business.

Although technologies have a large role to play, these are only as effective as their integration with existing working environments and cultures. Our research found that only a third of business leaders actively foster an atmosphere of agility within their business. Reinforcing this culture is an important step in enabling businesses to react quickly to customer needs and changes in the market. Any successful workflow automation programme needs to be supported by effective change management practices and training to drive employee adoption of new technologies.

Small and mid-sized businesses should capitalise on their agility and flexibility, deploying these increasingly sophisticated tools to drive performance and best practice data handling. Here are some of the strategic benefits and outcomes of implementing digital storage and automated document workflows.

Strategic benefits from automated document workflows

Reduce inefficiencies and human error

Manual workflow processing will almost always result in inefficiencies and mistakes. Documents get sent to the wrong person, emails get missed, files get lost or information is found missing. Automated workflows eradicate or minimise the possibility of error, speed up document routing and help employees make the best use of a document once it gets to its destination. Ricoh's managed scanning and archiving service aims to make employee's lives easier by freeing them from document and information management tasks. It is adaptable, user-friendly and mobile, dramatically aiding collaboration and driving productivity.

Optimise processes to improve customer service

Many businesses are customer facing and order processing, support provision and complaint handling are all daily occurrences. An automated workflow for these processes can dramatically improve the speed and personalisation with which businesses can interact with their customers. By automatically capturing and processing communications preferences, retailers can improve satisfaction by providing information and updates in a format and frequency that suits the customer perfectly. Ricoh Click and Post is a simple to use mail management solution that lets you distribute customer communications through their preferred channel. The process provides full visibility and control, as well as creating a consistent brand experience for your customers.

Optimise processes to improve employee satisfaction

As well as the cost saving and productivity benefits of digital acceleration, it plays a key role in recruiting and retaining top talent and skilled workers. 62% of European employees agreed that the best businesses spend a lot on new technology. Employees today expect to have access to more information, more quickly than ever before, via a broad array of devices and applications, if they are to perform at their best. Employers also broadly align with this line of thinking; 70% believe productivity-enabling workplace technology lies at the heart of their organisation's ability to thrive and 64% believe document management technologies will have the most positive impact on the way their business operates.

Improve access to information and simplify the back office

Routine activities can be streamlined and a sequence of steps within each automatic process can be configured to ensure consistency, completion, and efficiency. These back-office benefits are amplified when their output spans multiple departments and business functions. Simply put, if employees across a business can benefit from quicker access to more accurate or detailed information then productivity skyrockets. Ricoh's Branch Paperless service for example is an end-to-end solution designed for retail banking business. This solution reduces misfiled and misplaced documents making internal communication faster, improving customer response times.

Business continuity

In an always-on economy, business continuity is essential for long-term success. With digitised workflows, copies and back-ups can easily be produced and recorded. As well as cutting down on storage costs, this process reduces the risks of data being irretrievably lost in the case of serious incident or disaster. By using digital storage to create data backups and facilitate multiple user access, businesses can improve information availability throughout the organisation.

Ensure regulatory compliance

With increased availability comes increased accountability. Automated workflows provide businesses with demonstrably compliant systems. Auditable, transparent systems are a crucial component of data privacy and protection regulations. This is particularly true for industries that are entrusted with safeguarding sensitive, personally identifiable data. Regulations such as the GDPR require businesses to be accountable for the information they hold at all times. Capturing all relevant data such as the time and data when a file was last accessed, modified, shared or printed, and by whom, can often prove pivotal when demonstrating a visible audit trail. This simply isn't feasible for many businesses with manual or legacy systems. Installing an automated workflow system makes it far easier for internal and external agents to audit and review a company's data policies.

Minimise unstructured data

The ability to automatically turn paper-based and manually entered information into digital records is essential in modern business. Organisations naturally accrue a huge amount of unstructured data through their regular operations. Manual entry will only ever catch a fraction of this data. Aside from the threat of regulatory penalties, businesses are missing a vital source of revenue by letting this data slip through the net. Data is the lifeblood of modern enterprise and can inform every aspect of business operations. By investing in automated workflow processes, businesses can boost productivity and improve decision-making throughout their business by turning unstructured, lost data into valuable business intelligence.

Big data analytics

Laying the foundations for workflow automation tools is an incredibly useful processes for learning about the data you hold as a business. As mentioned, unstructured data can be incredibly valuable if it can be collated, analysed and deployed effectively. The same can be said of any data siloes within a business where information could be utilised elsewhere. Digitising and automating data collection and processing turns these silos into smart data hubs. With access, business units can use this data to make informed predictions around peaks and troughs in activity, design smart processes or protocols and many other ways of creating competitive advantage. With a transparent workflow automation system, it becomes much easier to spot inefficient elements of workflows where bottlenecks occur. Efficiencies and savings can be made in departments where you would never think to look. Finance departments for example can particularly benefit from process automation. Ricoh's

Invoicing Services provide bespoke invoicing processes to reduce processing costs and accelerate payment cycle times. Crucially, this software increases visibility into payment and provider habits, giving businesses the power to optimise these processes for efficiency and savings.

CSR and environmental impact

Automated document management services help businesses improve energy efficiency, resource conservation and human wellbeing in line with corporate sustainability targets. Digitalisation gives organisations an opportunity to demonstrate the positive impact they have on the environment. Modern business produces an astonishing number of documents. These documents can require a huge amount of energy if printed. Digitising and automating workflows naturally minimises this environmental impact, directly contributing to sustainability goals.
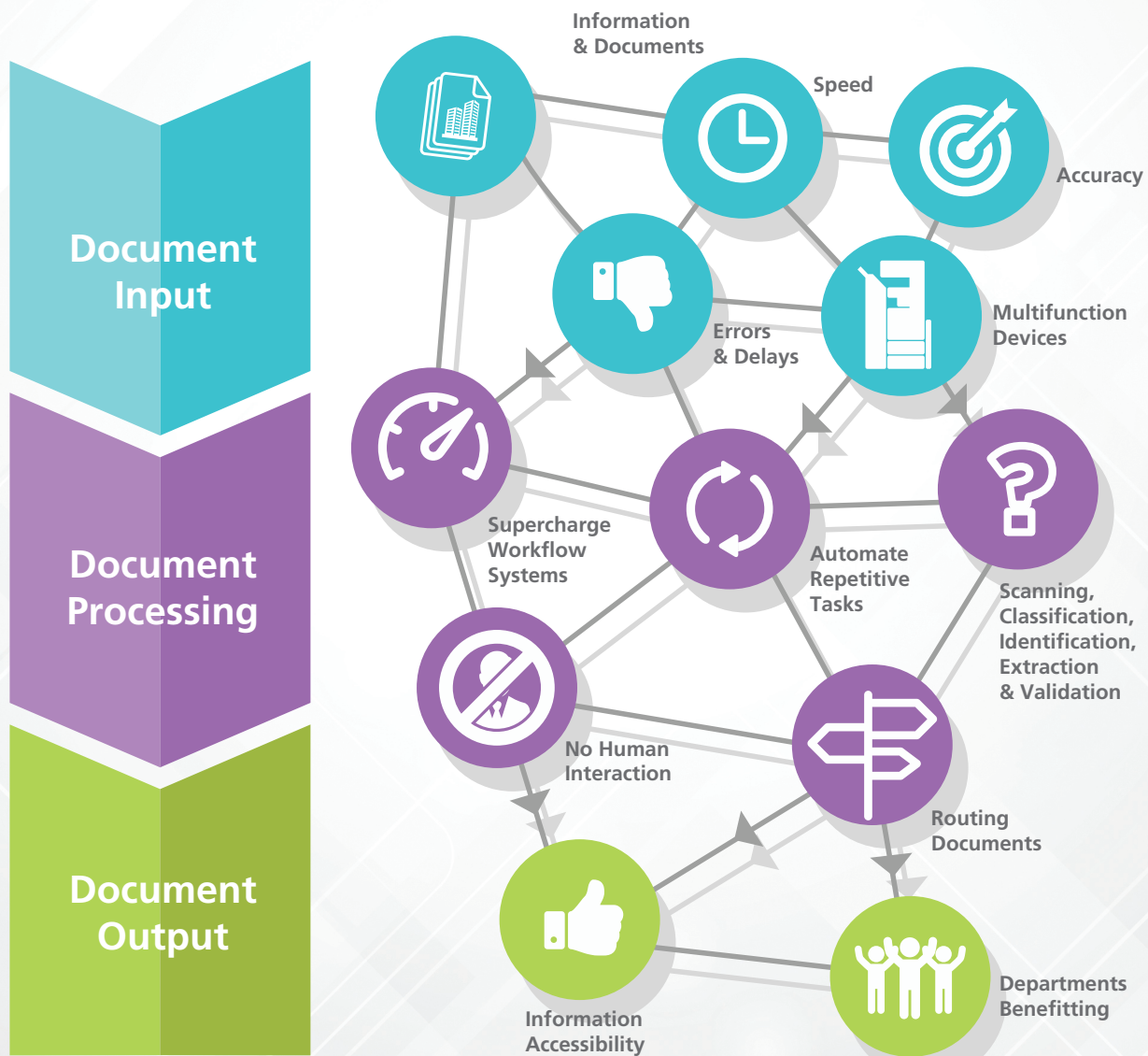
Case Study: esaote
Creativity in Healthcare

Esaote is one of the world's leading providers of medical diagnostic systems and healthcare informatics, with offices around the world. The company moved into its new high-tech headquarters in 2016 and used the opportunity to transform its business processes. Ricoh helped transform Esaote's print environment. Numerous stand-alone printers, photocopiers and scanners were replaced with a fleet of multifunctional printers (MFPs). Using an ID card to authenticate themselves, employees can release and collect print, at their convenience, from any MFP. The multifunctional technology provided a platform for further improvement. Consulting with Esaote, Ricoh moved several paper-based document processes, including invoice approval, to a digital platform. Rather than pass invoices from desk to desk, they are now scanned upon receipt and processed within an efficient electronic workflow. The benefits are immeasurable. Esaote's employees are more engaged, productivity has increased and Esaote is able to respond faster to market requirements.

So where to start with workflow automation?

Workflow automation means streamlining the flow of your information – capturing, managing, and transforming and utilising it. Ricoh's workflow services begin by evaluating the way information flows throughout the business. Then Ricoh helps redesign, implement and manage an enhanced set of business process that mirror the organisation's unique needs.

New applications and technologies are only effective if they integrate with your current working environment. Ricoh workflow services create the best possible fit between business applications, innovative technologies and the processes they are designed to enable. Ultimately, the goal is to reduce costs, time wastage and minimise risk while improving customer service and satisfaction.

Document Input

Document Processing

Document Output

Information & Documents

Speed

Accuracy

Errors & Delays

Multifunction Devices

Supercharge Workflow Systems

Automate Repetitive Tasks

Scanning, Classification, Identification, Extraction & Validation

No Human Interaction

Routing Documents

Information Accessibility

Departments Benefitting

Ricoh delivers workflow automation services that can improve the way your entire organisation works, collaborates and shares information. From your core infrastructure to the tools your people use and the way you communicate, Ricoh services connects your workforce to the right information, at the right time, in the right form, no matter where they are. Learn how your business can gain from workflow solutions and start using information effectively.

To find out how you can digitise your business, contact:

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