Does your company need Business Process Automation?

After 25 years of working within the document management industry I've seen lots of interesting challenges faced by businesses. Throughout this time, a consistent issue faced by many organisations is how to use the company's resources in the best possible way and I'd like to share some of my thoughts on this topic.

Working Smart

Most companies run a pretty tight ship. A typical manufacturing business may have streamlined its staffing costs, reduced the administration overhead, set up manufacturing partners in China and perhaps started selling products and services over the web. They've worked hard to maintain their competitiveness and are proud of their achievements... and so they should be.

But, walk into any company, large or small, and you'll still find mountains of paper – and this is the tip of the iceberg, hidden beneath the paper is often a myriad of manual paper based procedures, gradually sucking time and resource from the organisation like a giant leach.

Are you a busy fool?

Sometimes we seem to work harder and harder but never go forward.

Business process automation is all about working smart. In other words, as your business grows use the staff you've got in a more efficient way, rather than employing more and more people. So many successful companies fail to make the profits they deserve as they continually taking on more and more staff just to cope with out-dated and clumsy paper based procedures.

Business process automation is rather like a dedicated worker, who works 24 x 7 and never asks for a pay raise!

5 Ways to Automate your Business?

Here's some ideas of how you could automate your business processes:

1 - Document Management Software (DMS)

Companies generate a tremendous amount of paper and digital content. Proposals, contracts, customer profiles, human resources related documents, financial reports, forms, announcements and emails are generated every day. The fact is, most organisations cannot effectively manage the vast number of documents and data without document management software (DMS).

In simple terms, DMS connects company employees to the information they need to do their job – an accountant to their invoices, the warehouse manager to his signed despatch notes, the HR manager to her personal records and engineer to his change request forms. If you need information, it's the first place to look.

All good DMS products have the following features:

- Web browser access via PC, iPad or smart phone
- Available as a Cloud or on premise service. (e.g. infoRouter DMS)
- Scanning options both for low and high volume users
- Email interface – the ability to capture electronic emails either from an email address or an email client (e.g. MS Outlook)
- Ability to search via document content, meta-data or simple filing structure
- Version control – ensure people are always working with the latest information
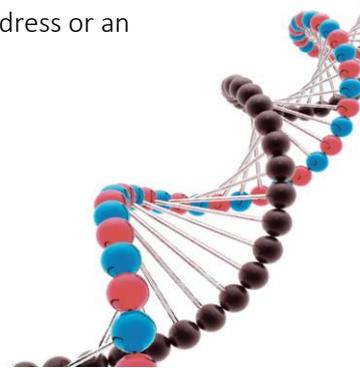
- Subscription – this allows users to subscribe to specific documents or folders, keeping them up to date if any changes are made (great for price lists, customer queries, new orders etc.)
- Advanced Security – replacing messy network drives with a secure repository of data is one of the main benefits of DMS (control who sees what and manage their interaction with the data)
- Workflow – replace manual paper based approval chains with an auditable electronic process – see section 5 for more info on workflow
- User Definable Portals – provide user "shop windows" into the data – only show them the bits which are relevant to their job role and interests
- Quick to install and simple to maintain – there's lots of legacy "Bloatware" DMS out there – modern DMS shouldn't require a "propeller head" to keep it running

2- Electronic Billing (e-Billing)

The timely delivery of documents is vital to any business, be it an invoice so you are paid on time or an urgent purchase order to buy crucial stock. How many times have you asked the question: "Am I really delivering this document in the most efficient and cost effective way?"

Post is a classic example. It's expensive, slow and sometimes very unreliable. When delivered, it's no better for the recipient - post needs opening, distributing and filing, all of which cost money. I'm amazed so many companies still persist in delivering business documents like statements and invoices by post.

Let's get your attention with an example:

Most industry analysts now put the cost of delivering a business document by post at £1 (many industry analysts maintain it's even higher) – this includes energy, paper, postage and labour but doesn't include the environmental impact.

If a company delivers just 1,000 invoices and 500 statements per month, that's a cost of:

1,500 x 12 = £18,000 per annum

It's amazing how many financial directors take notice when you give this example!

Invoice Formats

What format do I send my invoice in? This all depends on whether you are moving to a true e-commerce type scenario or simply looking to bill your customers more cost effectively. Output management software (e.g. Formate software) is an ideal "document translation hub" to take existing document output from your business system and seamlessly deliver to your customer in virtually any format. Electronic invoices can be presented in many different formats (e.g. PDF, XML, CSV, EDI, TIFF, HTML, FAX etc.) but most popular would be either PDF or XML format. PDF is an image representation of the invoice and is suitable for any size of customer, whereas XML is more suited to a true electronic interchange of invoice data and requires more setup (i.e. it's more suited to the big customers). A good starting point is PDF, moving to XML if required at a later date.

3- Hybrid Mail

Even if your volumes don't merit the cost of output management software, it may be worth considering a hybrid mail solution. In simple terms, you get a special hybrid mail print driver which is installed on to your local PC or server. You then print your documents (e.g. invoices) to the hybrid mail print driver, which automatically sends it to a print fulfilment company for printing, envelope stuffing and finally posting. As the fulfilment company processes many thousands of packets per week, you benefit from their purchasing power and sizeable postage discounts.

DG DOCUMENT genetics
business automation software
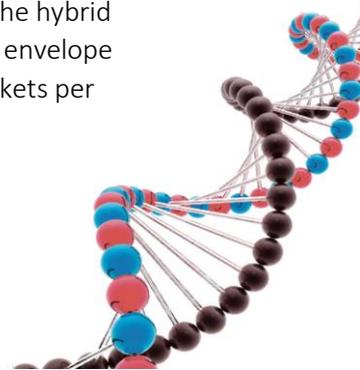
For example:

Using hybrid mail, a single page invoice, printed black and white, stuffed in to a window envelope and posted, equates to about 40 pence (at the time of writing) which is a significant discount over printing, stuffing and mailing it yourself – that's a 60p saving over if you were to produce this in-house.

4- Traceable Document Delivery

When a company moves away from post and starts delivering business documents electronically via email, the postage savings can be substantial. However, there is one drawback – emails can be blocked by spam filters, accidently deleted or simply not read.

There are now a new breed of cloud services (e.g. ParetoPost™) offering a secure web portal for delivering business critical documents with a full audit trail – this is ideal for invoices, statements, purchase orders, delivery notes, contracts, payslips or any document where traceability is vital.

Imagine you're a credit controller chasing overdue invoices, using a product like ParetoPost™ you can see when invoices have been viewed or downloaded. If the debtor claims not to have seen it, you can quickly point them at their secure client portal or resend the unique document web address. In simple terms, you take away their excuse not to pay, thereby improving your DSO (Days Sales Outstanding) and improving cash flow.

5- Workflow

During our working life we all carry out lots of repeatable tasks, many of which involve paper documents and a logical set of rules. Workflow software, or as it's often known, BPM (Business Process Management) software, allows us create the business process with its rules and logic but in a paperless environment.

Users would normally interact with the workflow process via email or a web portal on their intranet. Benefits of this type of system range from reduction in labour, faster processing of tasks, accountability, identification of resource bottlenecks and ability to remodel a process rapidly.

Typical workflow applications include:

•Supplier Invoice Approval

•Holiday Request Forms

•Customer Complaints

•Customer Request for Information

•Engineering Change Notes

•Purchase Requisitions

•Distributing Incoming Post Electronically (or Digital Mailrooms)

Workflow software offers many attractive benefits and associated savings, however many products on the market are expensive and complex and only suitable for large corporate companies with big budgets and IT resources (e.g. major banks or insurance companies). However, there are a new breed of workflow products built into document management systems (e.g. infoRouter software) which can be configured and deployed very quickly by non-technical staff.

We hope this brief overview of business process automation has been of interest and we've fired your imagination – we picked just five examples and of course there are many more. So go on, have a look around your business and identify some possible areas for improvement!

Joe Hyde

Joe Hyde is the Sales and Marketing Director at Document Genetics, an established UK based company providing a comprehensive range of business automation software. They focus on improving document automation, workflow and collaboration within their client organisations, and their range of innovative solutions and specialist services help to save time and money by processing documents and data more efficiently. If you'd like to discuss your business process automation application with Document Genetics, they'd be delighted to help.

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