

# Why You're Approaching Workflow Automation The Wrong Way



# Is Your Efficiency Sluggish?

Think about your business and its employees. How many tedious functions and tasks still require you to be physically involved or present? Submitting invoices. Shuffling through folders. Perpetually bugging your manager to finally approve an expense? These types of time wasters are a real problem that often go unaddressed.

Why?

- Because “it’s how we’ve always done it.”
- Because “we’re unaware of the solutions available to us”
- Because “it’s all we truly have to work with”



# You're Wasting Too Much Time

Employees spend less than 40% of their time at work doing actual strategic work.<sup>1</sup> Instead, they find themselves burning the clock – and productivity – on activities not always directly tied to advancing personal or company growth.

19%

searching and gathering information

14%

communication and collaborating internally

28%

reading and answering email

It doesn't have to be this way. And it shouldn't. Not for your business. Not for any business.

<sup>1</sup> International Data Corporation (IDC); McKinsey Global Institute analysis





## Overcoming the Fear

But yet, intimidation, fear of the unknown, and a lack of time often keep businesses at bay when it comes to implementing a technology solution that automates their menial tasks. And worse yet, the idea of implementing an actual workflow automation system creates fear of costs, compatibility with existing infrastructure, and actual employee adoption rates.

But data is pointing to a seemingly inevitable need for automated workflows:

- Between 2019 and 2025, the data we create and copy will grow by 61% annually – reaching 175 zettabytes, or 175 trillion gigabytes.<sup>1</sup>
- By 2025, nearly 30% of the world's data will need real-time processing, up 50% from 2017.<sup>1</sup>

This compounds the stress for mid-sized and small businesses when deciding what they need to do.

<sup>1</sup> Source: IDC's "Data Age 2015: The Digitization of the World from Edge to Core" November 2018.

# Understanding Workflow Automation

So, what **does** it mean for your business?

It means ripping you away from the manual data entry you once adored



Ensuring information makes it into your systems, allowing you to optimize your investment in those systems

It means no more waiting on others to give you the information you need



Giving you greater visibility into your processes, while removing bottle necks

It means no more coffee-stained and misplaced files while working remotely



Allowing you to access and share critical business information anywhere, anytime, from any device

Workflow automation means streamlining the flow of your information – capturing, managing, and transforming it along the way where and how you need.

This **gives you time back to focus on the strategic elements and functions of your business.** Take the menial tasks off your plate and spend the newfound time improving ROI and increasing revenue. It's what really matters after all.

# The Biggest Mistake



But when it comes to figuring out how and where your business can benefit by automating workflows, there is often one common mistake that many make: the belief they **need** to change their processes – particularly the back end of a process.

Businesses have a tendency to make a large technology investment and process overhaul. Swapping out the ERPs and accounting software. Upgrading the tech and storage hardware. Reassigning responsibilities among staff. This all can lead to poor adoption rates and adds unnecessary costs.

Even worse, the solution you put in place might actually **require extra steps** be added to the process because you're attempting to shoehorn technology with the false promises of better reporting, management, oversight and/or meeting some sort of tax, regulatory and compliance use case.

This is a trap you can't afford.

A man with glasses is sitting at a desk, looking at a laptop. The background is a modern office with large windows and some plants.

## Doing it the *Right* Way

So, the lesson becomes: If it isn't broken, don't fix it.

Keeping your existing technology and processes largely in place, businesses should instead focus on the front end or beginning of workflow processes, specifically regarding digitization.

That's because paper documents are slow, complex and expensive. They also put your information and your business at risk. A swift gust of wind or curious eyes can easily "misplace" your files. But **digitizing** information gives you:

- The ability to leverage your information throughout the entire process without the need for manual intervention along the way.
- Better visibility and alerts to potential problems and outstanding activity ahead of time – flipping the management of the process from reactive to proactive.
- A documented, formal structure and procedure that workers previously didn't have keeps processes smooth, accurate, and up-to-date.
- Provides/helps in meeting security and governance rules and regulations.





## A Digitally-Fueled Workflow

Think about your business for a second. The files. The people. The decisions.

Do you see the connection?

**All things documents, turn into all things data, which turn into ALL things for your business.**

Meaning, in the end, the success of your business is rooted not just in the value of your information, but the **format!**

Let's break it down:

- Paper documents are valuable and actionable pieces of information for your business
- Automated workflows drive that valuable information along the way, improving your business' performance
- Digitizing documents before they enter a workflow accelerates processes by reducing steps, manual labor, and print spend, thus further enhancing workflow ROI

Sounds good, right?

Here's what that looks like.



# Look Familiar?

This is your hypothetical accounts payable process. And because your office is the financial hub of your also hypothetical company, all the AP-related invoices, receipts, etc. from other locations are sent to you to manage and process.

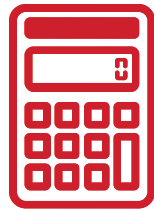


Employee at location 1 receives an invoice

Scans the invoice as a PDF

Emails the document to finance

Finance prints out the invoice



Manually fills out the rest of the information

Re-scans the invoice as a PDF

Saves a version for record keeping



Sends payment to the appropriate vendor

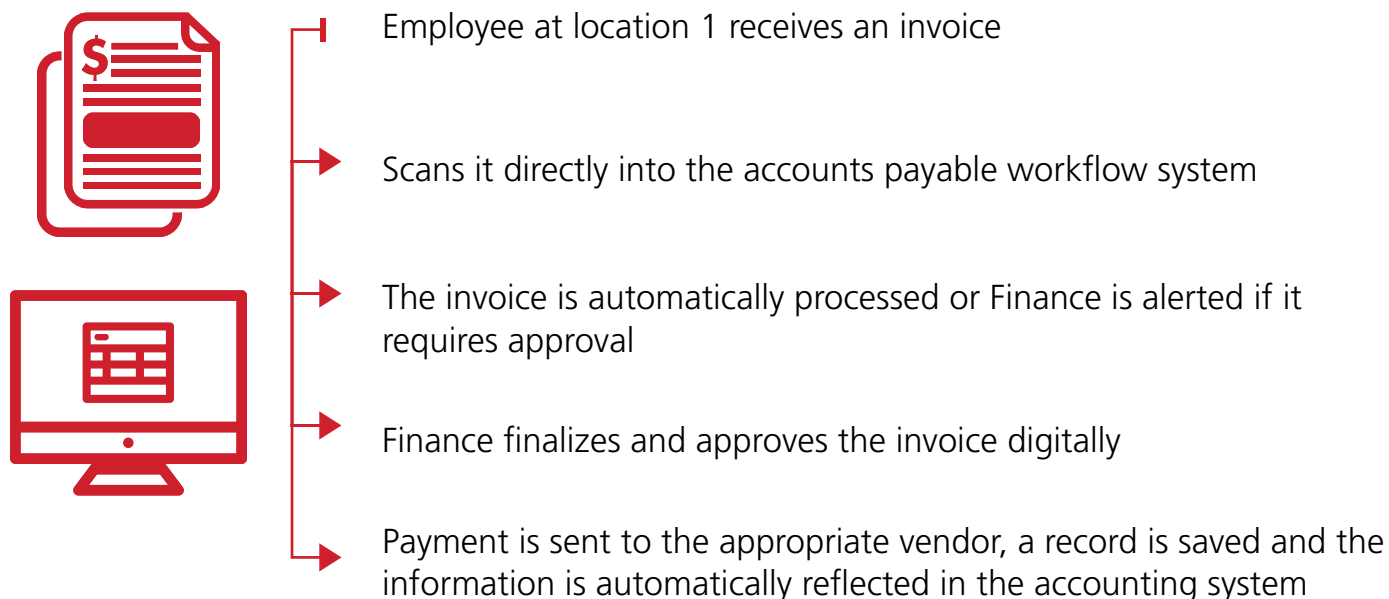
And finally enters the transaction into the accounting system

## TAKEAWAYS

- 9 steps
- Printing and re-scanning required
- Manual entry to systems

# Optimized Workflow

And here's what your workflow looks like when you optimize the front end with digitization. The positive ripple effect it has includes cutting steps, removing manual intervention and increasing accuracy.



## TAKEAWAYS

- Only 4 steps!
- Digitizing invoices leads to faster, more efficient processing -
- Automated approval, distribution, system input - go from a few days to a few minutes



## Getting Started

No more hypotheticals. Chances are your business can optimize or automate its workflow processes. The question is how.

Use this simple checklist to review your business:

- ☐ I'm concerned about the security of my information and potential loss of data associated with paper documents (fire, flood, theft, natural disaster, etc).
- ☐ My office is in the habit of printing documents too frequently.
- ☐ Data overload is becoming or has long been a problem for my workers.
- ☐ Too many employee hours are spent [re]scanning, printing, and filing documents to complete a task.
- ☐ Approving and sending documents to the next person requires too much waiting and nagging.
- ☐ My company or specific department doesn't have a documented process for tasks.
- ☐ We invested in workflow automation, but workers aren't adopting it fully.
- ☐ We invested in workflow automation, but the ROI isn't apparent.

If you are experiencing any of these symptoms, it might be time to get – or enhance – your workflow processes.



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