

# **Future-Ready:** Accelerating Digital Transformation Through Workflow Automation

Make the shift to a process culture driven by automation to sharpen your competitive edge, increase profits and accelerate your digital transformation.





## How can process leaders, operations management and senior executives adapt and seize the opportunity in front of them to digitalize?

The pandemic has taught us the importance of preparation. More specifically, that leaders, while nimble, need to be better prepared to keep business going in the face of any disruption. And one of the most future-proof ways to achieve this necessary agility and resiliency is through **workflow automation**.

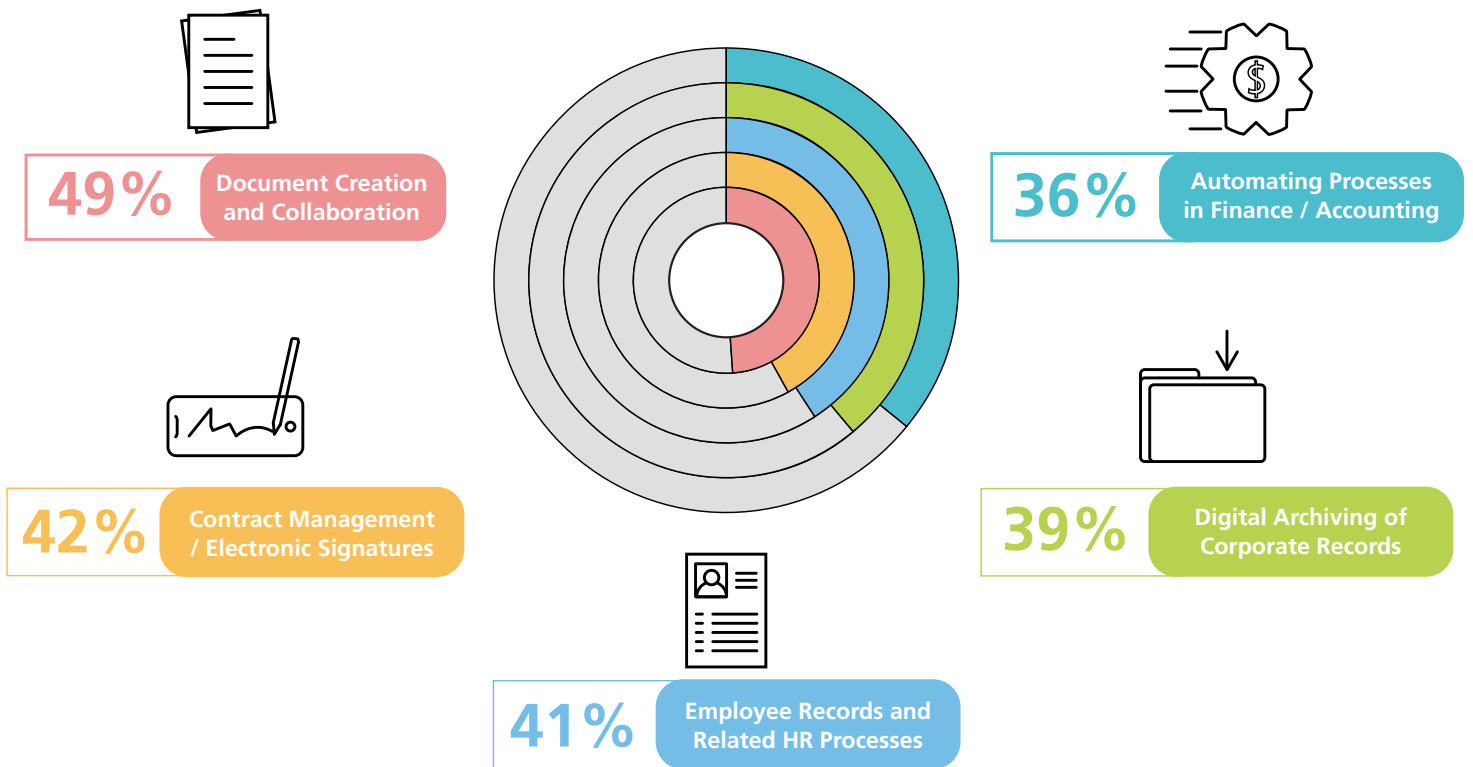
While not every Canadian organization needs to become '*digital by default*' (think Shopify), most have settled into a new world of work. However, what may be lost in the day to day is the unprecedented acceptance of, even desire for, process change that has come with it.

**This is not time to get comfortable. Now is the time to optimize.**

Once considered a misunderstood threat to the workforce, workflow automation is now a considerable advantage and for some, key to organizational survival during the COVID-19 pandemic. **Why?** As the cornerstone for agility, automation will enable users to achieve the same results whether it's during business-as-usual or upheaval, at the office or from home. And, not the least of which, it comes with significant benefits to the bottom line, increased competitive advantage, and a necessary step in any digital transformation journey.

# Understanding the basics of workflow automation

Many businesses are already digitizing important processes by implementing tools for:



\* DocuWare: The State of Mobile Workforce Management

“It’s estimated that the global mobile workforce will reach nearly two billion workers by the year 2022, and many businesses are already digitizing important processes by implementing tools for businesses who have taken the time and resources required to establish a system that supports a remote workforce are now seeing those efforts payoff. 73% of businesses surveyed said they considered cloud-based tools very-to-extremely valuable for managing a remote workforce during the COVID-19 pandemic.\*”



\*The State of Mobile Workforce Management: SURVEY RESULTS & INSIGHTS FROM BUSINESS OWNERS DURING COVID-19, DocuWare, July 2020. (DocuWare, a Ricoh company, is part of a holistic solution Ricoh provides to customers to help empower digital workplaces.)





The irony of workflow automation is that it sounds complicated. And, sometimes the underlying technical aspects of it really are, but the goal is to simplify the complex manual processes that consume day-to-day tasks.

Rather than using up valuable human time to keep track of what stage a task is in, or where the approval is, digital systems behind an automated process do that work. Constraints resulting from remote or distributed work models have necessitated the move away from time consuming, costly and error prone workflows. Business functions that touch finance, IT, sales and even regulatory compliance, are shifting at a higher rate than ever to more automated processes that allow workers to focus on more high-value priorities.

According to a recent Ricoh survey\*, automation is, for the first time, fueling greater excitement among workers for the following benefits:

- **Greater speed & flexibility from new technologies**
- **Easier and more immediate access to data**
- **Less repetitive tasks**
- **Automated administrative tasks**

**Make no mistake -- there has never been a better time to make the case for workflow automation. The even better news is that there are options for tackling, rethinking and implementing mapped processes in a whole new way, some faster than you think.**

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\* Ricoh – Introduction to Workflow Automation – Finance,  
[https://www.ricoh-europe.com/media/Ricoh\\_Workflow\\_Automation\\_Report\\_Finance\\_300dpi\\_tcm100-29570.pdf](https://www.ricoh-europe.com/media/Ricoh_Workflow_Automation_Report_Finance_300dpi_tcm100-29570.pdf)





# Top 5 benefits of workflow automation

## 1. FREES UP TIME & REDUCES HUMAN ERROR

*More time to focus on other business priorities*

Right from the start workflow automation pays dividends. Data that was formerly entered manually by an operator is now extracted by an Intelligent Indexing Engine. This instantly identifies the most valuable information on a document and converts it into highly structured, usable data. Machine learning technology remembers each document and your indexing corrections, so every capture increases the speed, accuracy and reliability of both. What once took hours or days of work now takes minutes. What once took hours or days of work now takes minutes, with virtually no errors. Errors drop to near zero. Time is money and plenty of it is saved thanks to automation. This is amplified in cases where the same data must be entered into multiple systems, eliminating duplicate entries.

All this may translate into personnel being available for more valuable functions.



## 2. REDUCES COSTS & DRIVES PROFIT

### *Take advantage of early-payment discounts*

Automatic transfer of approved items to ERP enables important opportunities for financial gain. When vendor payments are delayed because of processing issues businesses miss out on valuable “early-pay” discounts and may even incur late payment fees. Since invoice processing is expedited with automation, more invoices are paid on time and businesses can take advantage of those “early-pay” discounts. Additionally, automated payment processing can reduce and resolve incidents of overpayment through improved audits.

### *Go paperless*

Paper-based processes are becoming more and more expensive. The cost of purchasing, shipping, storing, handling and disposing of paper products in addition to printer supplies can easily be eliminated by moving to paperless, digital processes.

By eliminating or reducing paper, users can search for material digitally and end the time-consuming paper chases. Documents kept in digital form are always searchable and readily available for access by any authorized user, no matter where they are located, making them far easier to share and enable further action.

Investing in digital automated workflow, just as with any investment, anticipates a return. In this case, the return will come in the form of business and operating advantages that readily translate into financial gain. To calculate, you can use this simple formula:

$$\text{[Task Time Pre Automation]} - \text{[Task Time Post Automation]} \\ \times \text{[Hourly wage cost]} \times \text{[Number of Times Task is Performed]} = \text{Your ROI}$$

Measure the time a given task took prior to workflow automation and subtract the time it takes afterward. Then multiply that by the fully burdened hourly cost of the person responsible for that task. Finally, multiply by the number of times that task is performed. Even as we discuss the formula you can already sense that the opportunity to increase your profit is substantial.





### 3. STREAMLINES COMMUNICATIONS

Automation allows for effortless communication of completed tasks after approval to systems such as ERP and CRM. This helps with more accurate responses to tasks and issues that require special handling and exception queues.

#### *Improve Customer Service*

When a customer action or request triggers the start of a workflow, the entire customer response is completely automated. Workers are cued and reminded to complete tasks, which are already minimized by the work the automation picks up. Customers enjoy a faster response and their satisfaction can be surveyed and captured for future analysis.

#### *Improve Supplier And Vendor Satisfaction*

The same is true for interactions with suppliers, associates, and other business partners whose actions and requests trigger the start of a workflow. A fast and reliable response increases trust and improves the relationship your company has with others.

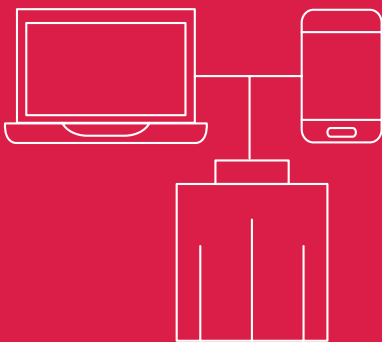


#### 4. CREATES BETTER ACCOUNTABILITY

##### *Disaster Recovery & Business Continuity*

Data is at the heart of any disaster recovery or business continuity plan. Operations are more likely to continue successfully during times of disruption when data is automatically ingested and indexed before storage and then backed up to redundant drives or data centres. Even the cutover from a primary data centre to a redundant one can benefit from workflow automation since several key steps in this process are system-based and automatable.

Others involve notification of various parties which can also be sent automatically when the cutover begins.



#### 5. ENHANCES REPORTING & ACCESSIBILITY

##### *Regulatory Compliance*

Audits are focused on a variety of processes performed by people and often in conjunction with data systems. Automation allows for more consistent and sustainable adherence to procedures and processes. Violations are caught by the workflow system long before they are picked up in an audit. Additionally, required regulatory tasks can be built directly into the automated workflow to help you achieve and maintain compliance.

##### *Rapid Audit Responses*

Audits are challenging in the best of times, but never more so when issues arise or items are called to attention. So when regulatory compliance is managed by automated workflows, all related information is stored and organized for rapid recall. Rather than hunting through reams of surveys and other documentation, the workflow engine is consulted to retrieve all pertinent documents and metrics.

This represents a significant time savings during the audit process and increases the ability to document compliance activities quickly and accurately which helps to prevent fines and penalties.



## Take the first (or next) step

*“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.” – Bill Gates*



Before you adopt any workflow automation solution the first step is to take stock of what you have right now and clean up what needs cleaning. Because building the right solution will require you to visualize the workflows you are expecting it to manage and anticipate issues that will inevitably arise. In other words, don't create more issues for yourself down the road.

### **Start or evolve your existing workflow automation planning with a diagram that includes the following:**

**Workflow Initiation** – What actually kicks-off or starts a given workflow? It might be an incoming message or document, an actual user request, or it may be event-driven as in when some quantity exceeds a certain threshold.

**Data Ingestion** – Usually workflows focus on the processing of data. For that to happen, the data needs to be in the system. Where this used to take the form of

an operator keying data in, today it is far more likely that a document containing the data may be scanned, or an electronic document such as an email or online form is “printed” to the workflow engine making the process familiar to any user who has ever printed anything, but removing the steps of printing to paper and scanning.

**Data Indexing** – Once ingested you will want to make it fast and easy to find the data during later processes. The best way to make data searches fast and easy is to index the data by establishing a software reference that makes finding specific information instantaneous.

**Task Management** – The workflow consists of a series of tasks many of which may depend upon the successful completion of previous tasks. Workflow automation sends a request to the first person responsible for the first task. When that person indicates completion the next person

### **Here are few starting points to help you get to grips with this stage.**

#### **Ask yourself these questions of your finance processes:**

- Which of your company's billing, payroll and invoice processes are handled manually?
- Which ones are automated?
- How many invoices or other finance requests do you process every week?
- What are your AP / AR customer goals for the near future?

**Don't rush this stage – make sure you've got all the information you need to give yourself a full understanding of your current processes.**



## Automate Manual Data Entry with Intelligent Indexing

How has automation solved the document management challenges that have only been magnified by the pandemic and remote work?

Let's look at some real-life examples in action.

**A paper-based process was used to satisfy compliance requirements, until a smarter way was presented, eliminating 40+ hours of filing each month.**

Lester works for a transportation/logistics company that processes about 12,000 shipments a year. Every shipment generates order forms, dispatch papers, bills of lading, proof of delivery, and reports. These documents provide the information needed to create an invoice and must be archived to satisfy Transport Canada compliance requirements.

To follow the current process in place, Lester must print out all documents for processing, even if they come in electronically. He must also ensure that all the appropriate information is then entered into the company's accounting software to create an order. This order, along with the supporting documentation, is then physically taken to the billing department to wait for proof of delivery.

The billing department is spending more than two hours each day filing the paperwork delivered. In addition to the time spent filing, if a document is requested by another department, a staff member must retrieve it from a file cabinet. If the hardcopy file is not found, the guessing game begins, and the staff must locate where the file resides.





## The Ricoh Solution

Easily and seamlessly scan documents directly into the electronic file cabinet or intelligent indexing tray. If scanning directly into the electronic filing cabinet, Lester can designate what type of document he is scanning to index directly at the machine. Lester can even scan to the intelligent indexing tray, eliminating the risk and time needed for manual data entry, making electronic filing a very simple task.

The hardcopy documents are scanned directly and routed appropriately with just a few clicks. Dispatchers directly annotate requests to add any important processing details before the request is routed to the next person in the workflow. Everyone with predefined permission can access the file as needed using well defined search terms or a full-text search. System audit trails enable employees to access information and determine which department updated them last, which leads to eliminating bottlenecks.

The appropriate information extracted from the scanned documents is sent directly into the accounting system. The system then generates a paper document that includes a barcode that contains the order number and other data. The barcode enables information to be extracted from the documents and automatically entered. The invoice is then generated and emailed to the customer, while a copy is stored for tracking retention.

### Business Challenges

- Multiple steps required to distribute documents to different recipients
- All documents need to be printed for processing
- Manual data entry is needed for items to move through the process
- Duplicate data entry is occurring just to move information upstream
- Physical paper must move through-out the departments from remote locations

### Business Results

- Increased worker productivity and efficiency with a simplified process of digitizing paper-based documents making it easy to search and retrieve documents
- Documents can be organized and stored without a waiting period to access them
- This solution eliminates 40+ hours per month spent on manual filing, removes eight file cabinets and reduces the time to process 12,000 shipments per year

[Learn more at Ricoh.ca](https://www.ricoh.ca)

## Simplify Capture, Storage & Retrieval



**An antiquated filing system that slowed down business gets a refresh. Time spent on approvals reduced from 4 hours per week to 30 minutes.**

Earl works for a family run company that has evolved from a scrap metal brokerage firm to a custom fencing provider/pavement marking contractor. A big part of the company's fence business is focused on high-security fencing for municipal, federal and other high-security customers. Since the company was established in the early 1900's, there is a very complicated, and quasi-structured filing system that has such a steep learning curve in its utilization, the company has hired staff to find and put away documents. In addition, business is slowed down when things get put on hold to retrieve the appropriate documents to move a project forward.





## The Ricoh Solution

Easily and seamlessly scan documents directly into the electronic file cabinet or intelligent indexing tray. If scanning directly into the electronic filing cabinet, Earl can designate what type of document he is scanning to index directly at the machine. Because Earl entered in the appropriate information at the time of scan, everyone can find the information easily. Earl can even scan to electronic trays to allow others to index (file-away) at their leisure.

Mobile solutions for field leads enable remote access to data and/or project documentation. Immediate access to data in the field speeds up business processes so the user and customer.

### Business Challenges

- Multiple steps required to distribute documents to varied recipients
- Search functions are limited and time consuming
- Manual handling of paper files is inefficient
- Unable to access documents from remote locations

### Business Results

- Increased worker productivity and efficiency with a simplified process of digitizing paper documents making it easy to search and retrieve documents
- Documents can be organized and stored without a waiting period to access them
- Find documents with ease since you no longer need to remember the file name or where it was saved (search using index values)
- Documents in the cloud are always available and can be accessed securely any time and from any device
- Documents are securely stored and backed up, reducing the risk of lost files
- Team lead's time spent on approvals reduced from 4 hours to 30 minutes per week

[Learn more at Ricoh.ca](https://www.ricoh.ca)

## Fast-Track Document Approvals



### **Redesigning a multi-step verification process, speeding response time from 30 days to 2 days and drastically improving customer satisfaction.**

Charlotte works for a Property Assessor in a provincial agency that maintains a comprehensive database of information for each of the more than five million properties. She is required to value real estate property, personal property, and business inventories across municipalities in order to maintain an accurate tax roll and to keep the legal property descriptions up to date. With valuations in place, the municipality's tax burden is then fairly and equitably distributed based on the tax rate applied to a property's assessed value. The Assessor and her staff determine market value and perform maintenance on over 350,000 taxable real estate, business and personal property accounts.

The process in Charlotte's office begins when it receives deeds and other property documents from various municipal clerks offices. These documents are sent electronically, printed, and then evaluated to determine which documents need to be acted upon. Her office can review over hundreds of thousands of documents annually and moves 12-15% of them through a multi-step verification process.

Time delays with documents being "stuck in-process" are very common. Workflows are slowed down by paper-based procedures which often lead to customer dissatisfaction. Customers may also call into the office questioning their tax bills and since hardcopy documents are various places, much time and multiple phone calls are required to resolve the issue.





## The Ricoh Solution

Easily and seamlessly scan documents directly into the electronic file cabinet or intelligent indexing tray. If scanning directly into the electronic filing cabinet, Charlotte can index directly at the machine, which includes choosing document type or any other metadata that would be used to find the document later. Charlotte can even scan to the intelligent indexing tray, eliminating the risk and time needed for manual data entry, making electronic filing a very simple task.

Electronic documents from a municipal clerk go through the Assessor's two-step review process before the workflow is deployed allowing employees to complete tasks simultaneously. Electronic stamps are added to a routing sheet so that in a single glance, management can tell where a document is in the workflow. Once a document has been completely processed, the Assessor's Office can easily send it electronically to the Treasury to update the tax billing amounts and generate an annual tax bill.

Document approvals are accelerated with automated workflows now completed simultaneously, speeding processing from 30 days down to 2 days. This allows Charlotte's team to easily meet the legislatively mandated processing schedule and ensures information is given to the Treasury Department in a timely manner. Now when customers call, much can be resolved in just one phone quick call to find the information they need.

### Business Challenges

- Multiple steps required to distribute documents to multiple recipients
- Processes are cumbersome and not transparent
- Many documents get "lost"
- Servicing the customer is a lengthy process that often has the customer waiting for information long periods of time

### Business Results

- Digital workflow ensures document processing compliance
- Employee accountability reduces errors and accelerates documents through the workflow
- Customer service improves with documents stored in one, easy to search archive - when folks call in questioning their tax bill, they can now address the concerns quickly
- Significant improvement to the way information is processed

[Learn more at Ricoh.ca](https://www.ricoh.ca)

# What if you could go back in time?



In a recent survey, Ricoh's DocuWare\* asked business leaders:

***"If you could go back in time before the coronavirus pandemic, what processes or digitization initiatives would you implement to better prepare for remote workforce?"***

## Here were their top 4 answers:

### 1. Deploy a partial or part-time mobile workforce to get used to hybrid and distributed models.

This includes providing training on mobile solutions and collaboration tools, and equipping workers with the hardware and software they need to communicate and complete tasks. Respondents said they would have had team members work from home periodically to ensure everyone was used to the processes and environment.

### 2. Take advantage of cloud storage and software solutions.

Many people said in hindsight, most — if not all — processes should have been cloud-based to allow for a more seamless rollout to remote work.

### 3. Build culture digitally as well as in-person.

You've had plenty of experience with Zoom meetings during the COVID-19 crisis, but that's just one collaborative tool. Many respondents said they would have invested more money and time into using real-time collaboration tools so employees could feel connected despite geographic distance. (RicoH can help here too!)

### 4. Have an emergency or disaster plan in place.

Respondents noted that they simply were not prepared for an emergency as well as they assumed. Reviewing the disaster response plan and ensuring it's current, practical and actionable was a key learning for many.

\* Optimize Your Mobile Workforce | A DocuWare Survey, July 2020.

Polled: 534 business owners and managers in charge of whether employees worked remotely during the coronavirus pandemic.



Now and in the future, where a worker sits should not affect their ability to deliver 100% of their work or feel connected to their organization. Whether it's committees, boards or the teams on the ground primed for change, there has never been a better engaged time to look at your long-term planning to accelerate your digital or hybrid transformation to become future-ready and resilient – many Canadian organizations are already taking that path.

The good news is that solutions have been designed to support every employee, no matter their location and to bridge workplace and workforce gaps exposed by the pandemic – **Ricoh can help.**

Specific to paper and processes, our industry-leading digitization tools enable you to go paperless with your documents.

- Capture, store, organize and retrieve them instantly without ever touching a paper document again.
- Digital workflow enables digital process automation.
- Advanced document management keeps files secure and organized.

**Empower the next workforce. Learn more about how Ricoh can help your teams work smarter.**

**Talk To A Ricoh Expert To Get Started**

