

# Understanding the key obstacles to your capture and workflow project – and how to overcome them



## Capture is a mature – but still underutilized -- technology

In a recent AIIM survey, we asked organizations a simple question:

“In the following processes, is the volume of paper *increasing* or *decreasing*?” The answers might surprise you:

	% where "paper is decreasing"
Records management	63%
Mortgage origination	62%
Customer loyalty programs	61%
Technical documents	60%
HR (Recruitment and Applicant Tracking)	59%
Supply chain management	57%
Customer on-boarding	56%
New account opening	55%
HR (On-boarding, Employment Management, Off-boarding)	54%
Patient care administration	52%
Claims processing	52%
Loan processing	51%
Order fulfillment	50%
Logistics	49%
In-bound mail and forms	47%
Contract management	46%
Accounts Payable	46%
Accounts Receivable	44%
Manufacturing	44%
Legal	35%

The reason I say the answers may surprise you is twofold. First, in an era in which most organizations at least *claim* that they are moving to digitize their business models, the percentages indicate that far from “digitally transforming,” many organizations still have a long way to go when it comes to automating the basic back-office processes that are the guts of any business.

The second source of surprise is that there are a number of core processes that frankly have been the “meat and potatoes” of the ECM industry for a *long time* – contracts management, accounts payable, accounts receivable, digital mailroom, and legal, to name a few – in which *the majority of organizations have yet to seriously attack the paper problem*.

### Why is this?

I would argue that the “past” of ECM and process automation projects casts a long shadow. In the late 1990s, Enterprise Content Management became a mainstream technology (at least for large organizations) by first focusing on early adopters eager to automate high-value, mission-critical, and document-intensive processes critical to gaining competitive advantage. In this high-stakes environment, it didn’t really matter whether the technology was expensive, custom, and complicated.

A **LOT** has changed in the past five years as core content management, workflow, and capture

technologies have dropped dramatically in cost and pressures from mobile technologies and the cloud have made all this ECM stuff a LOT easier and more accessible to organizations of all sizes. Consider the following:

- 65% of organizations say the demand by customers for digital/paperless communications is increasing.
- 56% say an immediate priority is to “automate more manual processes with document classification,” and an additional 20% say they must “Improve security and compliance.”
- For 35%, the initial driver to go paperless was “cost-saving in specific areas, e.g., AP/invoice processing.”

Let’s consider the most important business drivers for capture and workflow technologies. AIIM asked end user organizations to pick their top three:

Improved searchability and shareability of business documents	51%
Improved process productivity	46%
Reduced physical storage space	45%
Enabling anytime, anywhere content access	32%
Improved collaboration	30%
Records security and compliance	26%
Faster response to customers/citizens/staff	26%
Business continuity	15%
Enabling content analytics/big data	8%
Reduced postage/transportation and document logistics	8%
Sustainability/environmental initiatives	7%
Building move or facility rationalization	5%

So what’s the hold-up? One traditional obstacle has been the “signature” problem. 30% of organizations say, “We need physical signatures on paper,” even though for the most part *they really don’t*, and for 22%, signatures are the primary reason why paper is retained.

Another obstacle has been truly understanding process flows and the need to keep documents that are “born digital” in digital form. 40% of organizations say, “Most of the documents we scan are unchanged from printer to scanner,” begging the question of why they were ever printed in the first place. 30% say, “Most of the electronic invoices we receive still get printed at some point.”

AIIM asked experienced end users to identify the top three difficulties encountered in their capture and workflow implementations, and the results are revealing:

1. 75% -- “Re-orienting staff/change management”
2. 50% -- “Educating/persuading staff to comply with classification and compliance.”
3. 33% -- “Defining the processes clearly.”

The good news is that these aren’t *technology* issues. Core capture and workflow technologies are mature and they work. For organizations just getting started, the core capture and workflow requirements necessary to address the above issues center around security, productivity, efficiency, and simplicity.



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You might also be interested in [Understanding the “Three” Root Causes of Process Inefficiency](#).