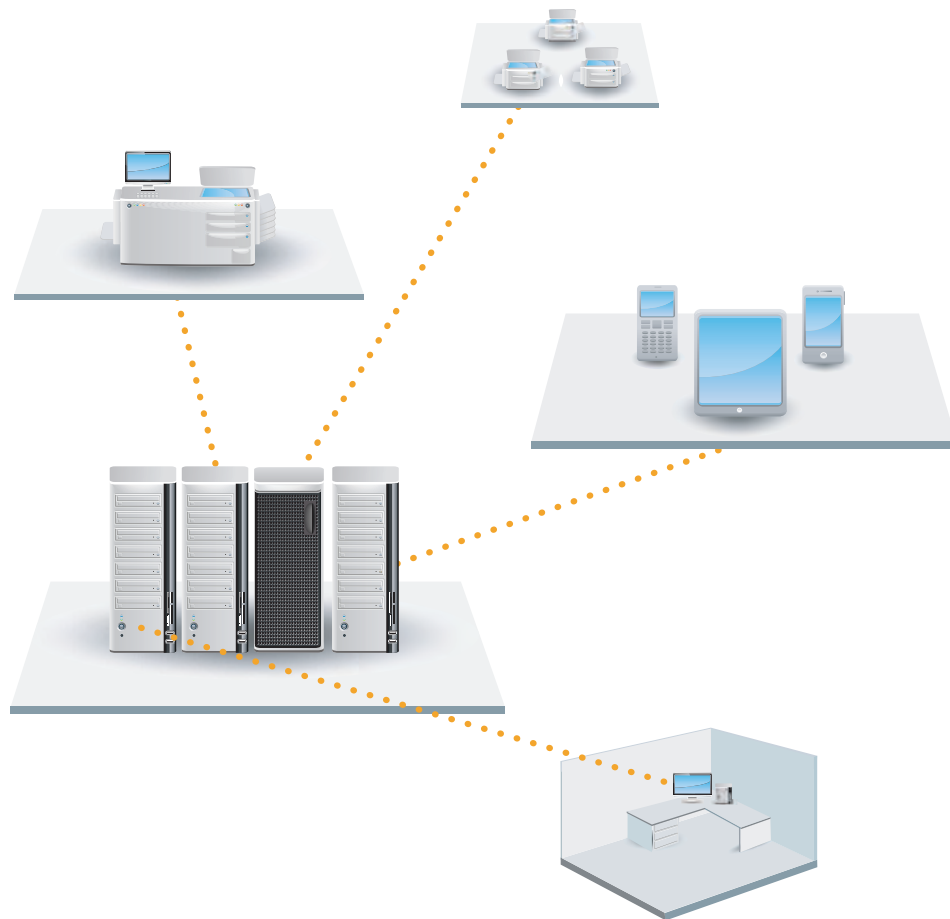


Distributed and Mobile Capture - moving the process closer to the customer



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About the White Paper

As the non-profit association dedicated to nurturing, growing and supporting the user and supplier communities of ECM (Enterprise Content Management) and Social Business Systems (or Enterprise 2.0), AIIM is proud to provide this research at no charge. In this way the education, the entire community can leverage the thought-leadership and direction provided by our work. Our objective is to present the “wisdom of the crowds” based on our 70,000-strong community.

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Process used and survey demographics

The survey results quoted in this report are taken from a survey carried out between 11 May 2012 and 29 May 2012, with 328 responses from individual members of the AIIM community surveyed using a Web-based tool. Invitations to take the survey were sent via email to a selection of AIIM’s 70,000 registered individuals. Respondents are predominantly from North America and cover a representative spread of industry and government sectors. Results from organizations of less than 10 employees have not been included, bringing the total respondents to 245.

About AIIM

AIIM has been an advocate and supporter of information professionals for nearly 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants. AIIM runs a series of training programs, including the Capture training course www.aiim.org/Training/Capture-Course.

About the author

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Introduction

The closer to the point of origin that content is captured, the faster it reaches the start of the downstream process. Distributed capture platforms have already extended the data entry point to include branch offices and subsidiaries, speeding up customer response and reducing the amount of physical handling required. The next step is to provide capture on mobile devices - in the field, on the move, and even in the hands of customers and suppliers.

Using mobile devices for capture presents an immediate technical challenge as regards image quality from the camera and the capability of the recognition process, but it also presents two major additional issues: security and integrity. Many of the potential application areas in finance, insurance, healthcare, etc., are security sensitive in their own right. In addition, local capture is useful for proof of identity, proof of creditworthiness, and proof of signature, but these are all subject to privacy rules, or indeed, data protection laws in many countries.

Assured integrity applies to the end-to-end process itself. Ad hoc "send to" arrangements (like emailing a picture or saving to a local file-system) are not reliable for employee use and are completely inappropriate for customer self-service. A one-touch process initiation is required, with completion taking place in an assured, secure way, no matter what issues of coverage, bandwidth, battery exhaustion, or server connections apply.

In this report, we will review the adoption of distributed capture systems for on-premise use, and plans for extension to local and mobile devices. We will look at the potential benefits of capturing as close to the customer as possible, including customer self-service, and also at the business and technical issues of concern. We will then provide useful ROI data for business-case preparation based on the views of existing and potential users.

Key Findings

Adoption:

- Only one third of organizations are scanning inbound forms in advance of the process. Of these, 11% are scanning "at-the-door" with a digital mailroom. However, 32% only use scanning for archive post-process.
- Image-only scanning with manual indexing is still the most prevalent mechanism. 18% are using full data capture to multiple processes. 36% are capturing keywords or full text for indexing
- 64% are scanning-to-process in distributed workplaces and 16% in stores or retail branches. Less than 10% have extended their capture to mobile staff or to customers.
- 50% are using or implementing a distributed capture system. Only 11% are using or implementing a mobile capture system.
- 28% are keen to set up tablet apps capturing direct to back-office processes, but only 1% are currently doing so. 14% are providing customer self-service capture on their premises and a further 18% would like to do so.

Benefits:

- Minimizing delays to process-start and reducing times for approval loops are considered the biggest benefits of extending capture to portable or mobile devices of employees, followed by savings in physical handling and transport costs.
- Reduced load on frontline staff and improved customer experience are the biggest potential benefits for extending capture to home or mobile devices of customers, followed by the improved likelihood that they will have supporting documents at hand.
- Signatures and approvals are the most likely candidates for local or mobile capture, followed by inspection reports and document capture direct to case-files.

Issues:

- Security is a "huge issue" with mobile capture on smart devices for over 50% of organizations. 12% would "never" extend outside of the office, and 53% will only consider using company-supplied devices, and will require a total security nail-down.
- Quality of scanning is a concern on mobile devices, but technical integration with back-office systems is a bigger concern for distributed capture in general.

- Multi-device support is given as bigger potential problem than end-to-end integrity but this may reflect a lack of actual experience in the field.
- “Security and audit wrappers” and “guaranteed chain-of-custody to back-office systems” are the most looked-for features in a mobile capture platform.

ROI:

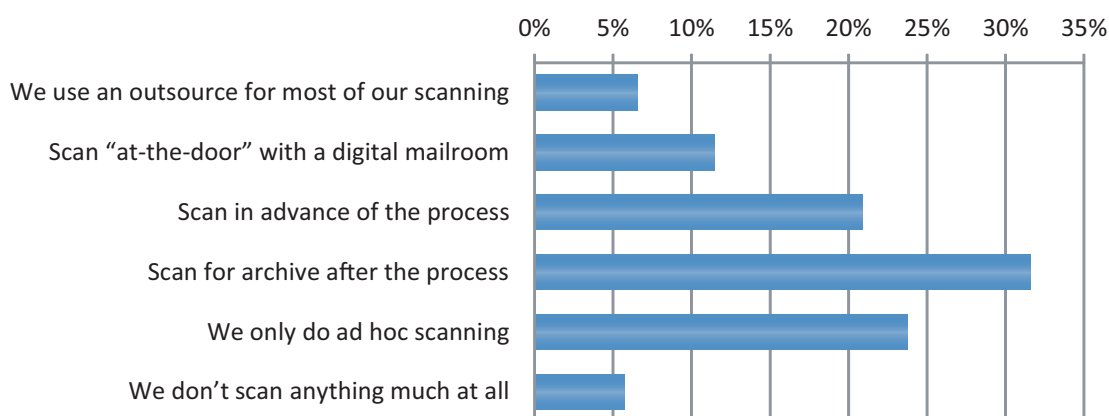
- 14% of respondents would consider mobile capture to be “a game changer”. Overall, 32% would find it “very valuable.”
- 32% would find considerable value in extending capture direct to customers, with 11% considering it to be “transformational”.
- 45% of respondents consider that if travelling staff could input directly to back-office processes, productivity would improve by a third. The average suggested improvement is 36%.
- The ability of employees to locally capture and interact with back-office processes would improve response to customers by a factor of three times, according to 45% of respondents. The average was 3.2 times.
- 51% of users of mobile capture report a payback period of 18 months or less, with 71% seeing a return within 2 years.

Adoption

Scanning

Document scanning has been an established process for many, many years, and yet organizations have been slow to move beyond simple imaging for archival purposes. In our survey, only 32% are scanning inbound forms and documents in advance of the process, with an equal number systematically scanning post-process, and the remaining third doing either ad hoc scanning, or using an outsource service. There has, however, been a steady increase in those adopting a “scan-at-the-door” or digital mailroom strategy for all inbound forms and documents. This speeds up routing and processing, but also enables a more focused, enterprise-wide investment in capture capability.

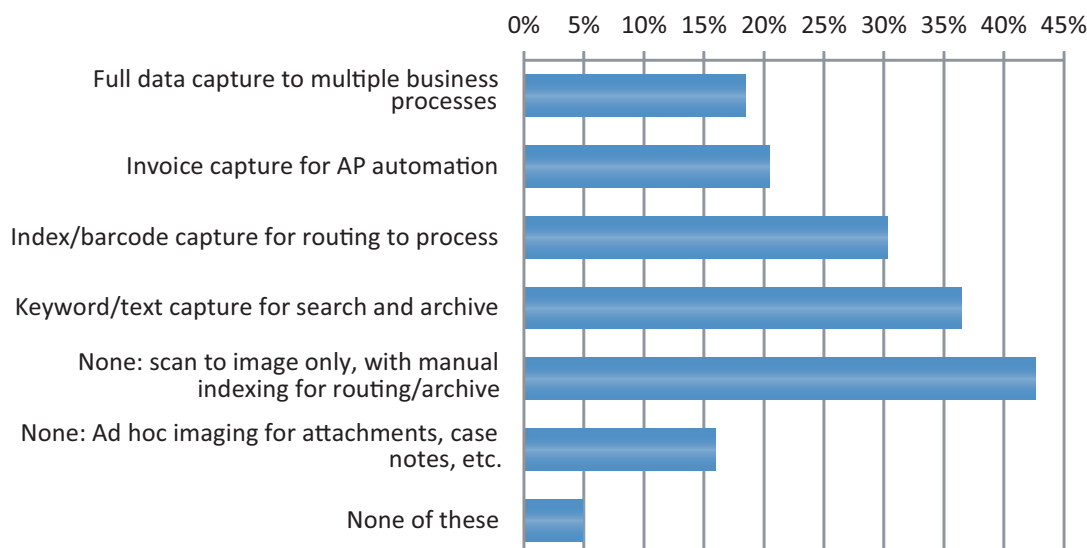
Figure 1: Which of the following best describes how you mostly deal with inbound documents and forms in your business unit? (N=244)



Data Capture

Looking in more detail at the levels of recognition and data capture, we see that only 18% of our respondents are using full data capture to multiple business processes, with just a few more using dedicated capture for AP automation (invoice processing). Keyword or full-text capture for indexing is more prevalent at 36%. The majority of the remainder are scanning to image only, with manual keying of indexing metadata – a somewhat labor-intensive, and error prone process.

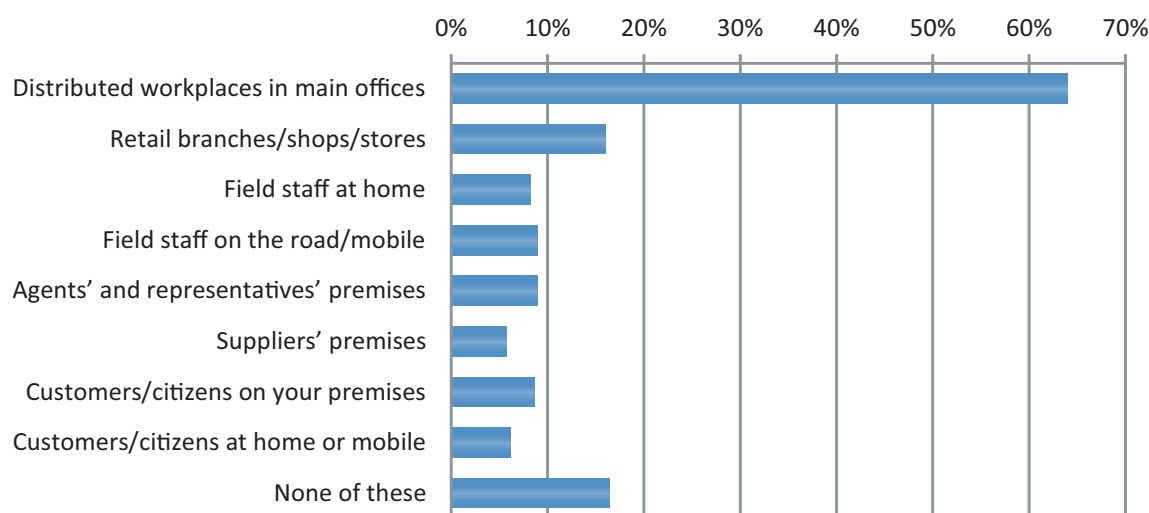
Figure 2: What level of automated data capture/recognition do you generally apply to your scanned documents and forms? (Check all that are significant) (N=244)



External Capture

Distributed capture has been driven strongly by the ubiquitous MFP or MFD (Multi-Function Printer/Device), which may scan direct to a network drive or to email, but is much more productive if it connects to a uniform distributed capture system providing a user friendly, one-touch scan-to-process. We see in Figure 3 that 64% are scanning in distributed workplaces within main offices, although not all of these are connected to a single data capture system. This drops to 16% scanning in branches, shops and stores - although this is not relevant to some industry sectors. Once we move outside of the firewall, adoption drops rapidly with less than 10% extending capture to field staff at home or on the move, with a similar picture for direct-to-process input from agents, customers, citizens or suppliers.

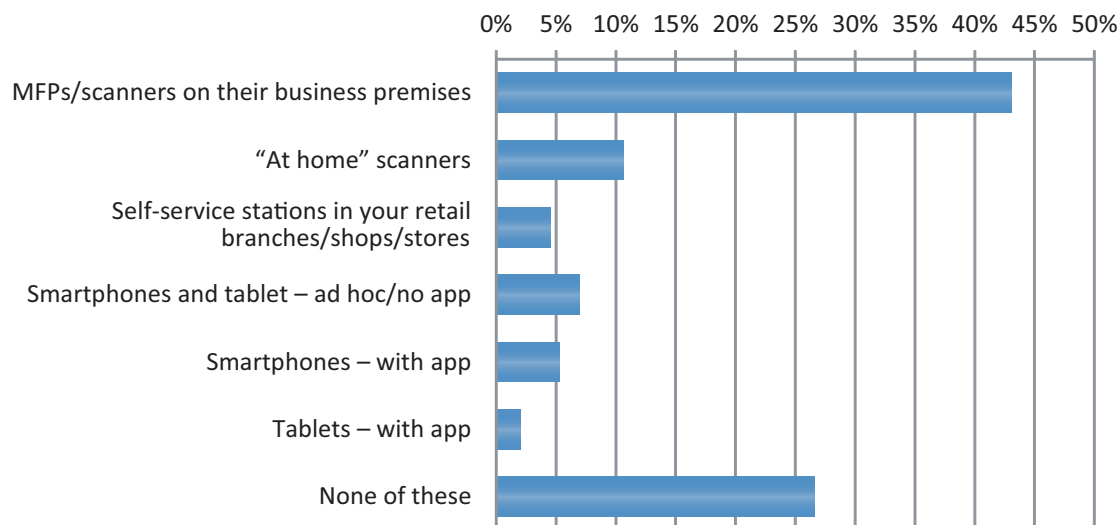
Figure 3: Are forms and documents currently scanned and/or captured in any of the following places for use in your key business processes? (N=244)



Capture Devices

We asked what devices agents, customers, citizens or suppliers are using to scan in forms and documents (whether connected to a distributed system or not). Not surprisingly, the most likely scenario is conventional MFPs and scanners used within their business premises, but “at home” scanners are used by 10%. Some businesses are already extending capture to smartphones and tablets, but much of this is ad hoc, with only 5% using apps on smartphones, and just 2% extending this to tablets.

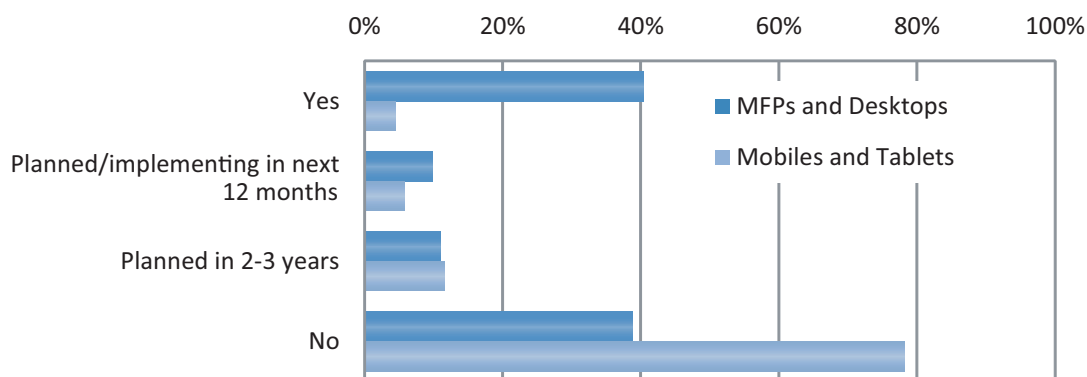
Figure 4: Do your agents/customers/citizens/suppliers currently use any of the following devices to scan and/or capture forms and documents for use in your key business processes? (N=244)



Distributed Capture Systems

When we asked about distributed scanning platforms linked to centralized capture servers, 40% have systems in use, and a further 10% are currently implementing. Usage is surprisingly even across industry sectors, except for Finance, where 65% have systems. Only 5% of organizations have as yet extended their scanning platform to mobiles and tablets, with 6% implementing over the next 12 months. A further 12% are planning to go down this route in the next 2 or 3 years. As we will see later, the first priority for many organizations is to implement a homogenous scanning environment on-premise, integrated with the main enterprise systems and processes, and then to extend that environment off-premise to mobiles and tablets.

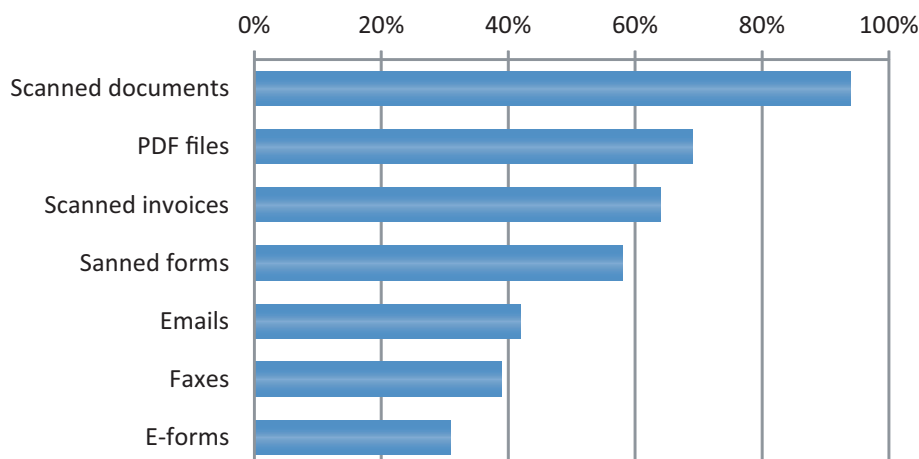
Figure 5: Do you have a distributed scanning platform linking MFPs and Desktops/mobiles and tablets to centralized capture server(s)? (N=243)



Captured Data Types

Of those using a capture system, it is reassuring to see that nearly 70% are capturing PDF files as well as scanned documents, although given that 64% are inputting scanned invoices, a high proportion of the PDF files are likely to be invoices. Feeding faxes, emails and e-forms into the downstream process alongside scanned documents has the strong benefit of standardizing the process (and the technical integration) against multi-channel customer correspondence.

Figure 6: Which of the following do you ingest via your capture system? (N=123 with a capture system)

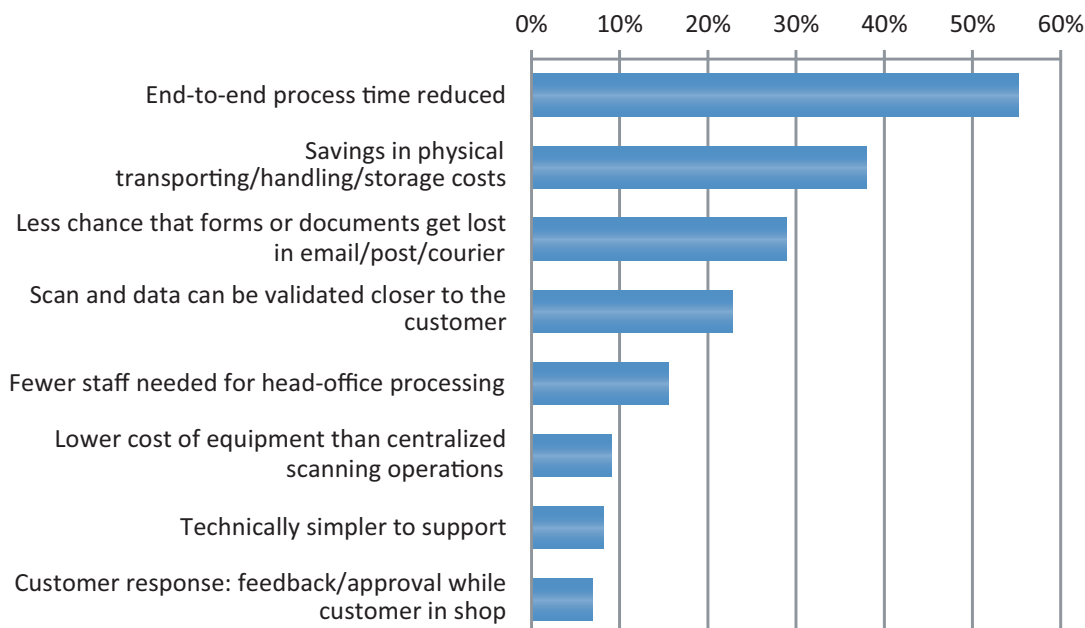


Potential Benefits

In-House Distributed Capture

The biggest benefit of extending capture beyond centralized or outsourced systems is that the end-to-end process time is reduced, with processes starting sooner, and with more local control of resources and queuing times. Obviously, this will have a direct benefit to customer service, but also represents an improvement in productivity. Next come savings in transport and physical storage, along with a reduced potential for lost documents in transit – which might be physical documents, but can also apply to ad hoc email attachments. Scanning closer to the point of origin also speeds up the quality loop, with local staff better able to validate scan quality and resultant data at the point of customer contact. The responses of those already using distributed capture systems are very similar to those who do not have a system, indicating that predicted benefits for any particular organization are highly likely to match actual outcomes.

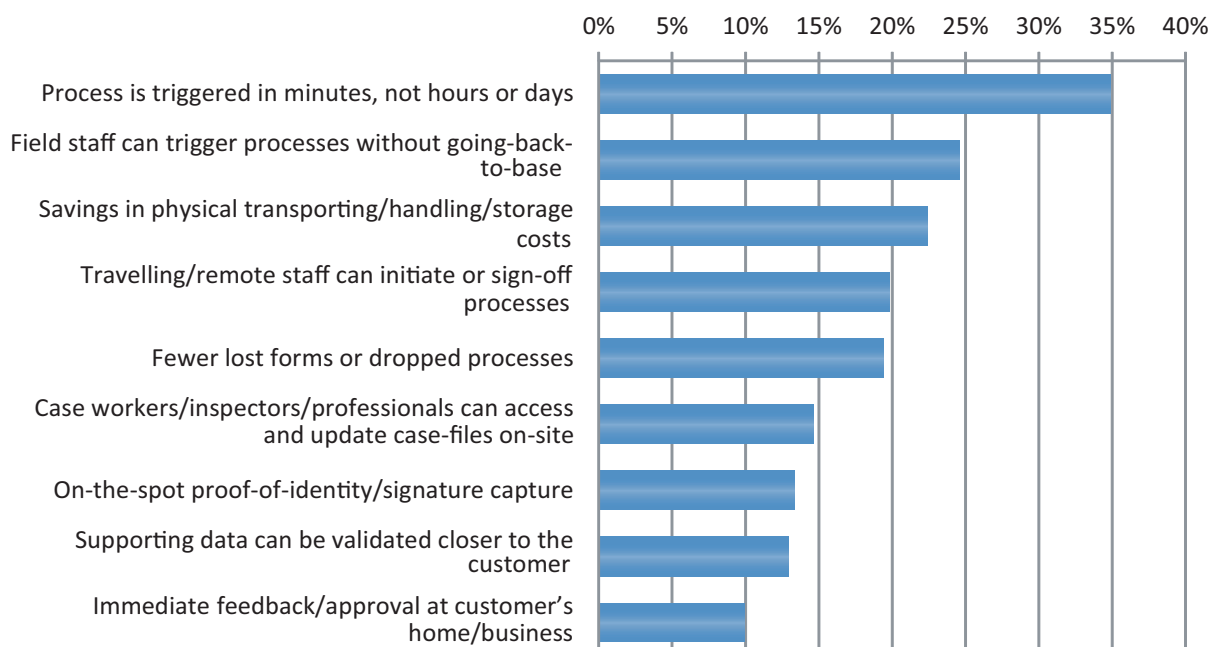
Figure 7: In your organization, what would be the three biggest benefits from a distributed capture system encompassing your branch offices, shops, subsidiaries, plants, depots? (N=232)



Local/Mobile Capture - Employees

The workforce is becoming increasingly mobile - at home through teleworking, on the road travelling, and in the field selling, inspecting, servicing, etc. There is also an increasing expectation by customers, suppliers and partners that business is conducted “at speed,” with turnaround times measured in hours not weeks. If forms and documents are part of this business, the process can be dramatically sped up if the initiating employee can ingest them into the systems and processes from wherever they are. Many processes involve approval loops, and although there are electronic alternatives to “wet ink” signatures, we will see that signature capture is an important application for mobile capture in order to keep the approvals moving.

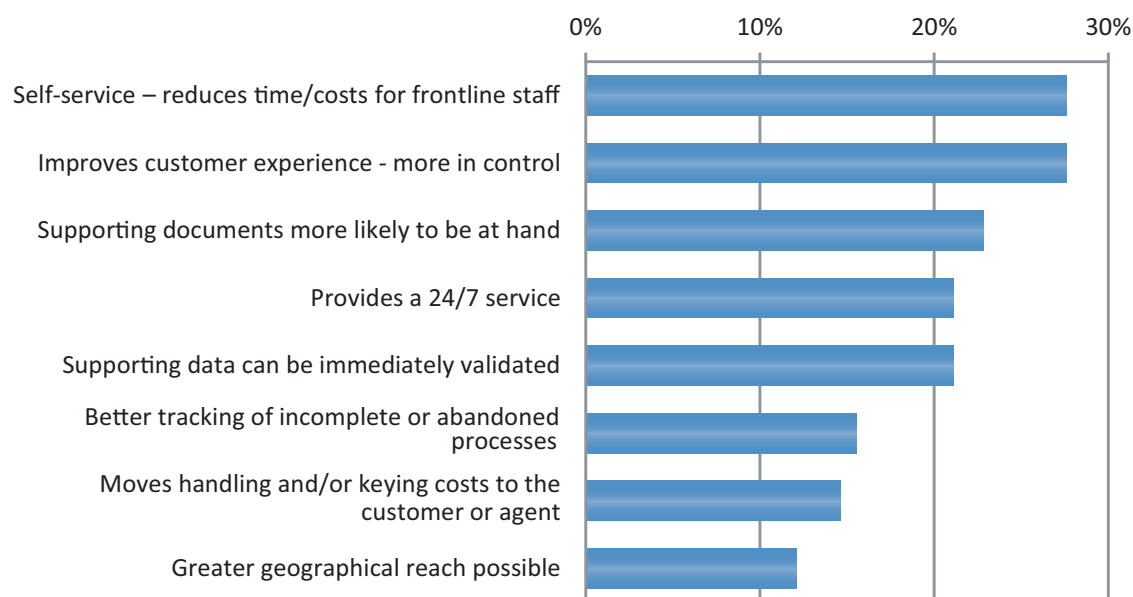
Figure 8: In your organization, what would be the three biggest benefits from extending distributed capture to the home, portable or mobile devices of your employees? (N=232)



Local/Mobile Capture – Customers, Citizens, Partners

The dream for most business managers is to get customers to do the heavy-lifting before staff are involved. Web sales have always brought these benefits, although as we all know, customers also like the feeling of being in control, and they like the simplicity and 24/7 availability of e-business. Many customer and citizen transactions begin with application forms or approval forms, and frequently include supporting documentation and proofs of identity. Even if the form is filled in on the web, if the customer is able to scan and submit these additional documents themselves, the process can get underway much sooner. For many industry sectors, particularly finance, intermediaries and agents are also prepared to put in the extra time in order to speed up the process and improve the service they give to their customers. One interesting aspect of the ranking we see in Figure 9 is that cost and time savings for frontline staff are considered more important than the savings on back-office handling and keying costs, reflecting the fact that customer-facing staff are always more expensive than back-office admin.

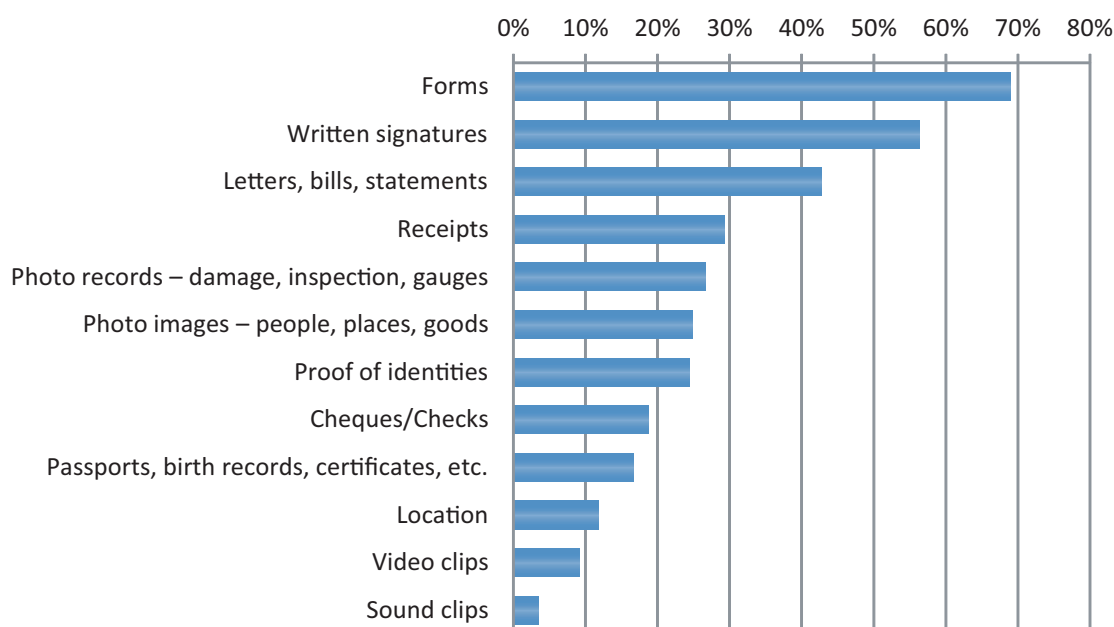
Figure 9: In your organization, what would be the three biggest benefits from extending distributed capture to the office, home, portable or mobile devices of your agents/customers/citizens/suppliers (N=232)



Content Types

Obviously, the best candidate processes and content types for mobile capture will be highly dependent on specific industries, but written signatures come through strongly. As mentioned previously, digital signatures can go part-way to solving this within or between businesses, but in the consumer, citizen or patient area it is much simpler to scan a written signature, as part of a form or contract, and utilize it as a confirmation. In these situations, the signature is the most important aspect of the document as the rest of the form can probably be pre-filled. Receipts also figure strongly as more and more businesses adopt mobile-enabled expense claim systems. In fact this represents a good example of how a truly process-driven, end-to-end, one-touch system is so much more convenient and reliable than ad-hoc scanning of single or multiple receipts on a smartphone, then sending them back to the office as email attachments.

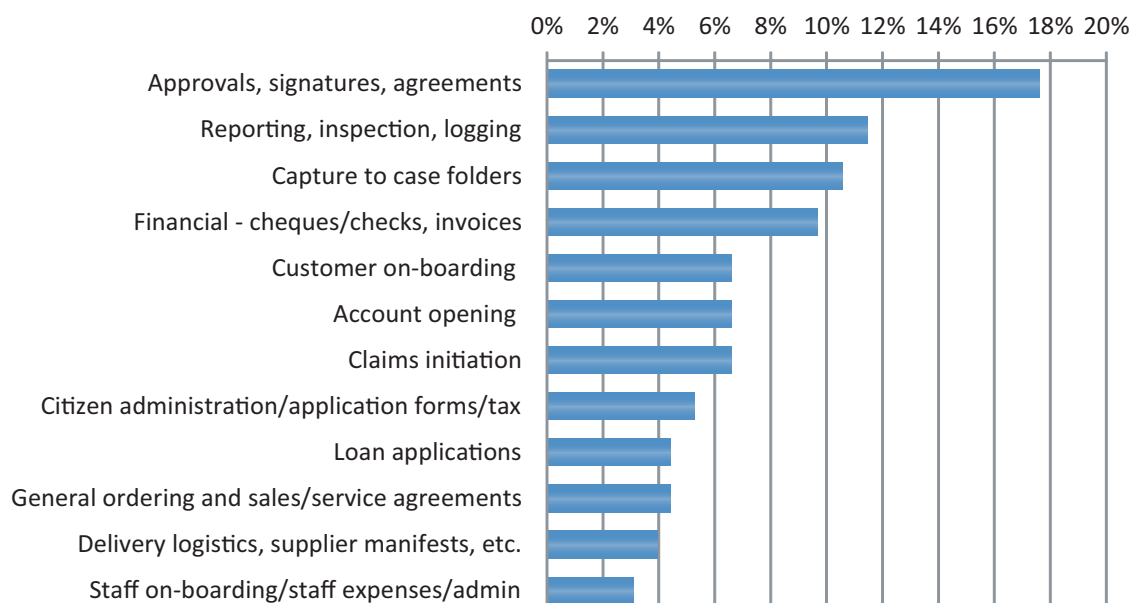
Figure 10: What content types would it be useful for you to capture on mobile for back-office processing or recording? (N=214)



Processes

Figure 11 shows a whole range of possible processes for mobile-enablement, and respondents were asked to pick the single most-productive candidate – not necessarily the easiest to roll-out or the most widely used. Interestingly, the two lowest ranking candidates are the familiar courier delivery hand-held terminal, and the staff expenses application described above. Approvals and signatures, reports and inspections, and capturing direct to case-files are given the highest rating for impact and productivity improvement.

Figure 11: Which (single) process would be the most productive candidate for extending distributed capture in or beyond your organization (N=227)

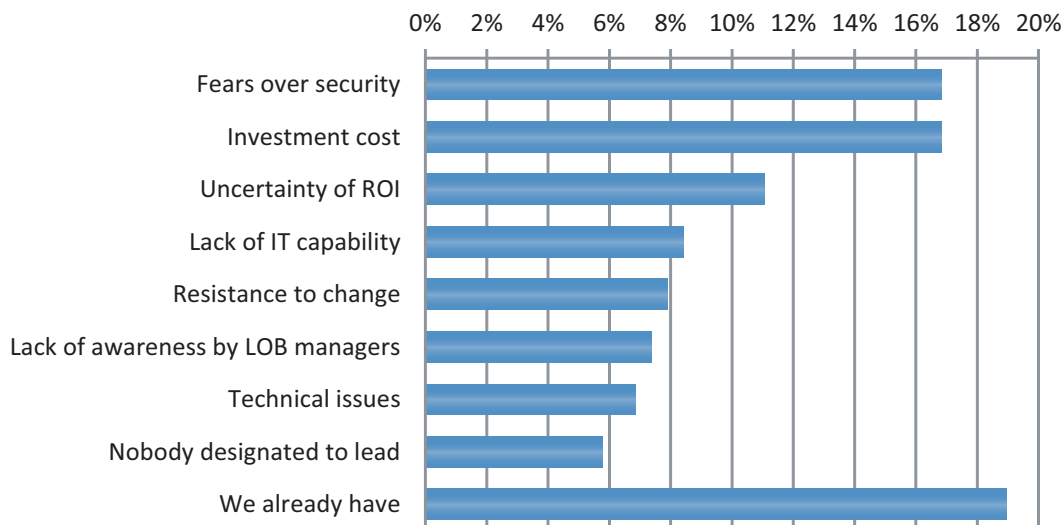


Issues and Inhibitors

Business Issues

Fear over security is the biggest single inhibitor for extending capture outside of the firewall, followed by the investment cost and uncertainty of ROI. Taking these together, along with the 4th item - lack of IT capability - paints an interesting picture. Organizations are aware that the best way to achieve a secure mobile capture platform is to invest in a capable, productized system rather than relying on ad hoc in-house developments, but that can bump up the initial costs. However, taking short cuts will increase long term support costs, may compromise security, and may result in a lack of acceptance by users or customers.

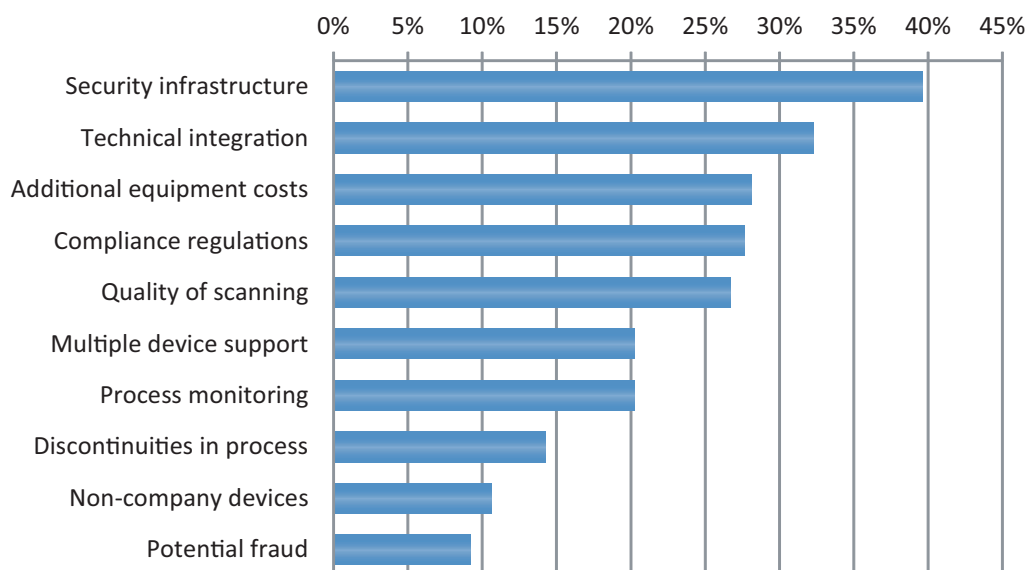
Figure 12: What would you consider to be the single biggest business reason that your organization hasn't extended your content capture beyond the main office? (N=190 excl. 27 Don't Know/NA)



Technical Issues

On the technical side, achieving a robust security infrastructure is a key concern, along with the integration difficulties of connecting to back-office systems. This, of course, highlights the benefit of extending an existing capture platform rather than investing in a new stand-alone mobile system. In heavily regulated industries there are overriding compliance requirements that must be in place whether the system is mobile or on-premise, and design of the end-to-end process is important to ensure that these are satisfied. Beyond this, quality of scanning is a concern, and this will be both device-dependent, and related to the image processing element of the capture software that runs on the device itself. Multiple device support is also an area where a product supplier can be expected to keep up with the most popular platforms.

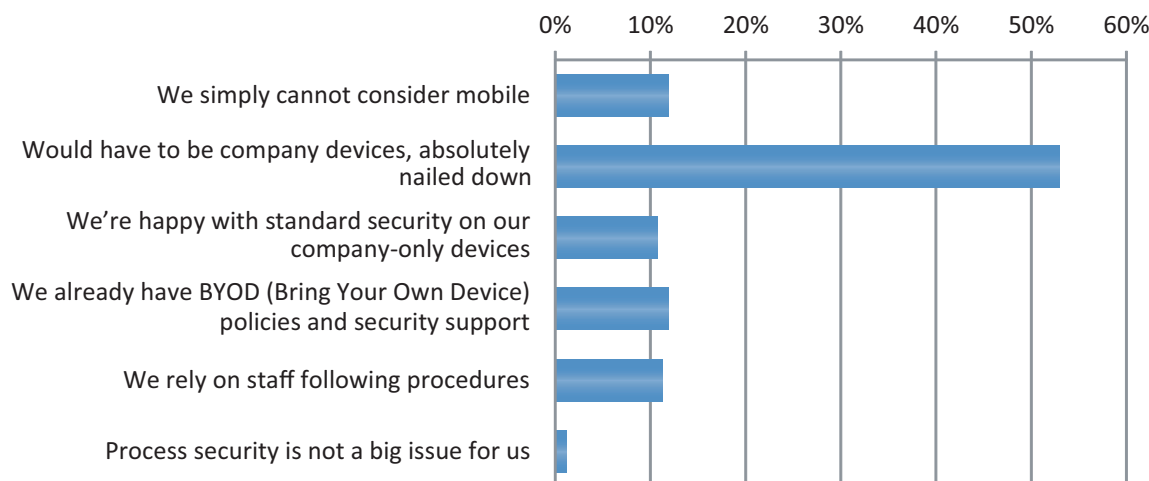
Figure 13: What would you consider to be the three biggest technical issues with extending your content capture beyond the current limits? (N=176 excl. 31 Don't Know)



Security

Looking in more specific detail at security requirements, we see that 12% will “never” extend outside of the firewall. Just over half (53%) would only allow access by company-owned devices and they would need to be robustly secured. 11% are happy with security on their existing company-issued devices. This leaves 23% who would be happy to support capture on personal devices, relying on staff to be sensible about security procedures. Of course, in theory, extending mobile access to customers’ own devices is at their own risk, but they might not appreciate an app that leaves an image of a sensitive document stored in an open PDF or photos folder.

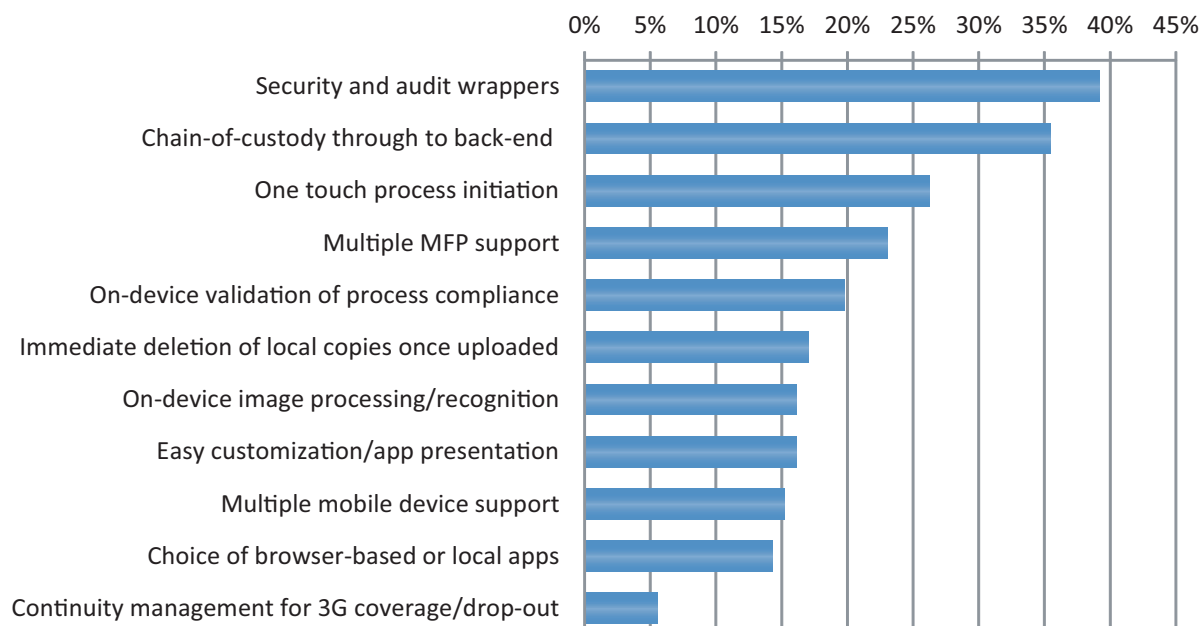
Figure 14: How would extending processes to mobile match your security requirements?
(N=168, excl. 49 Don’t Know)



Capture Platform Features

As might be expected, potential purchasers of distributed and mobile capture platforms will be looking for robust security and audit wrappers, along with a guaranteed chain-of-custody through to back-end systems. Next most important is one touch process initiation. Multiple MFP support is important for the widest possible on-premise deployment, extension through the supply-chain, or indeed, customer-at-home support. Many of the other features listed in Figure 15 would be considered important, but respondents were limited to a maximum of three.

Figure 15: Which three of the following would be the most important aspects of a remote/mobile capture deployment for you? (N=217)



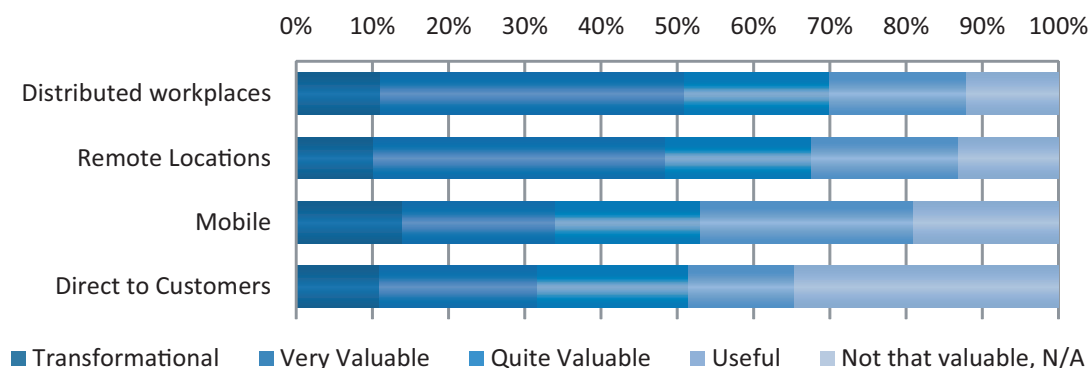
ROI

Value

Over half of our respondents consider extending distributed capture to multiple workplaces to be “very valuable,” including 11% who consider it “transformational”. It is worthy of note that twice as many of those who have a capture system rate it as transformational compared to those with no system. Most respondents also rate extending capture to remote locations in the same way.

Extending to mobile has an even higher proportion considering it to be transformational (14%) although slightly less overall. Extending capture direct to customers is likely to be less applicable in some industries, so if we normalize against that, the “transformational” score rises to 17%, with nearly half seeing it as very valuable.

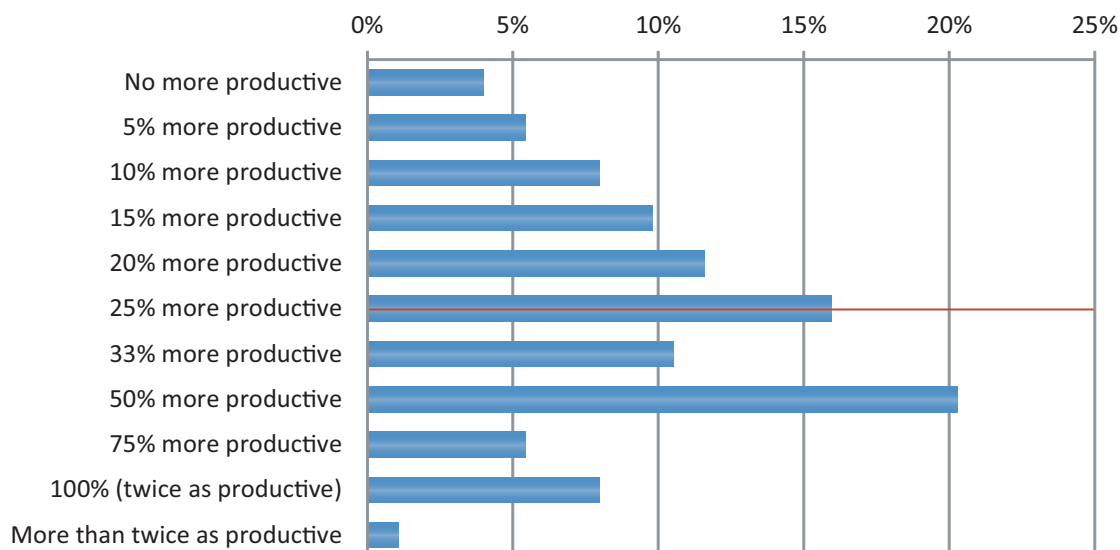
Figure 16: How valuable would it be (or is it) to your operations to extend your capture-enabled processes to: (N=227)



Productivity

In another recent AIIM survey¹, we asked respondents about the likely improvement in productivity for field-based or travelling staff if they could input to or interact with back-office processes using mobile devices. 45% reported a potential improvement in productivity of a third or more, with an average overall of 36% improvement. Given that these people are likely to be much more expensive to run than back-office employees, this level of potential saving is impressive.

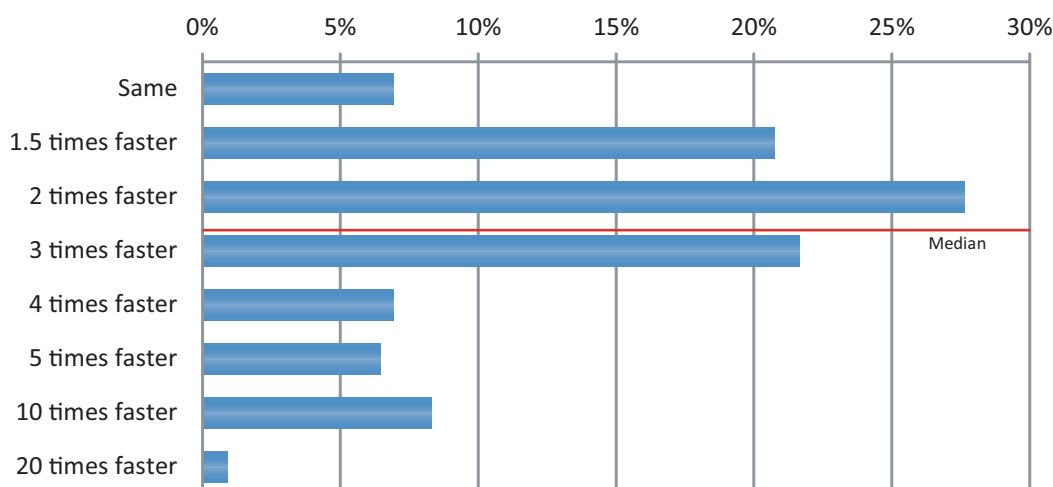
Figure 17: How much more productive do you think the field-based or travelling staff in your organization would be (or are) if they could input directly to, and/or interact with back-office processes using mobile (hand-held) devices? (N=276, excl. 63 N/A or Don't Know)



Response

Perhaps even more impressive is the potential to improve response time to customers, suppliers, citizens or staff. 45% consider that mobile enablement would improve speed of response by 3 or more times, with an average of 3.2 times. Given that many organizations consider customer response to be an important KPI, this is a very strong indicator of ROI.

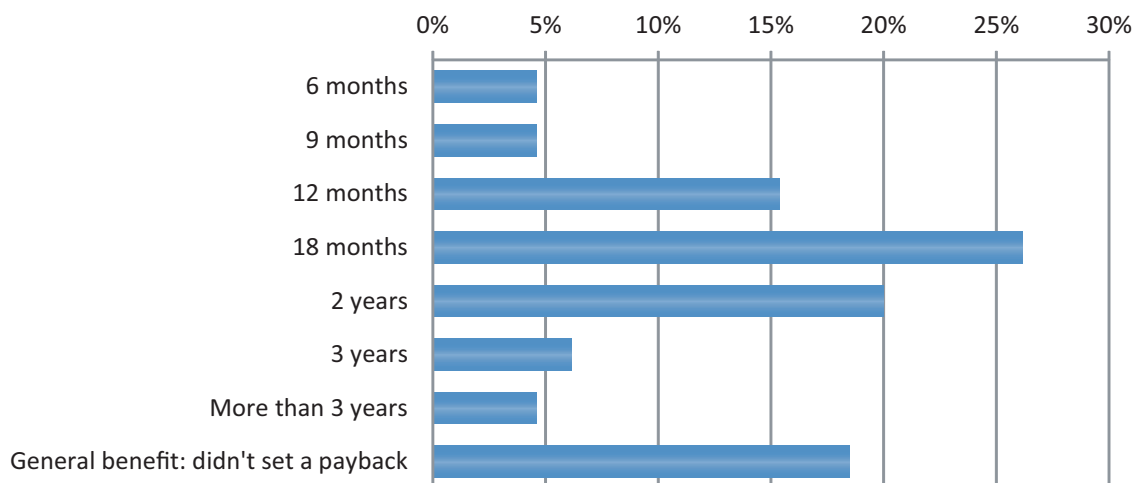
Figure 18: By what factor would you say the use of mobile information access, process interaction and local capture has improved or would improve the speed of response of your operational unit to customers, suppliers, citizens or staff? (Think about waiting time or elapsed time in minutes, hours or days) (N=217, excl. 113 N/A or Don't Know)



Payback Period

Again, from a previous AIIM survey², 51% considered that they have achieved or are on track to achieve payback on their portable or mobile capture investments within 18 months, with 71% looking at 2 years or less. A further 18% did not set a specific payback target but consider it to be a general benefit to their infrastructure.

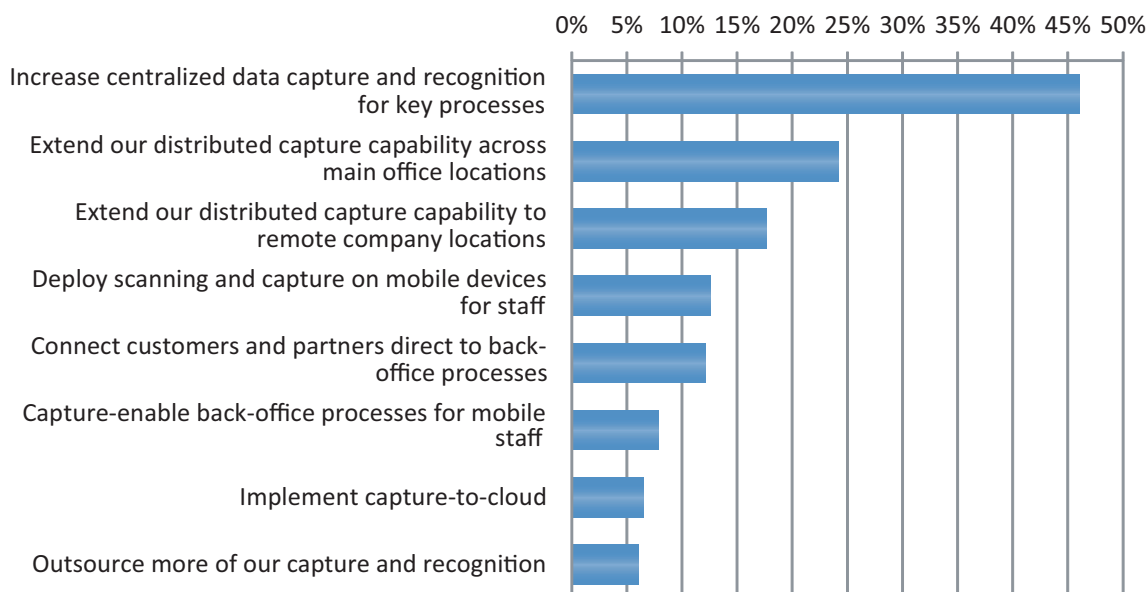
Figure 19: What payback period would you say you have achieved, or are on track to achieve, from your portable/mobile capture investments? (N= 65 users, excl. 33 Don't Knows)



Priorities

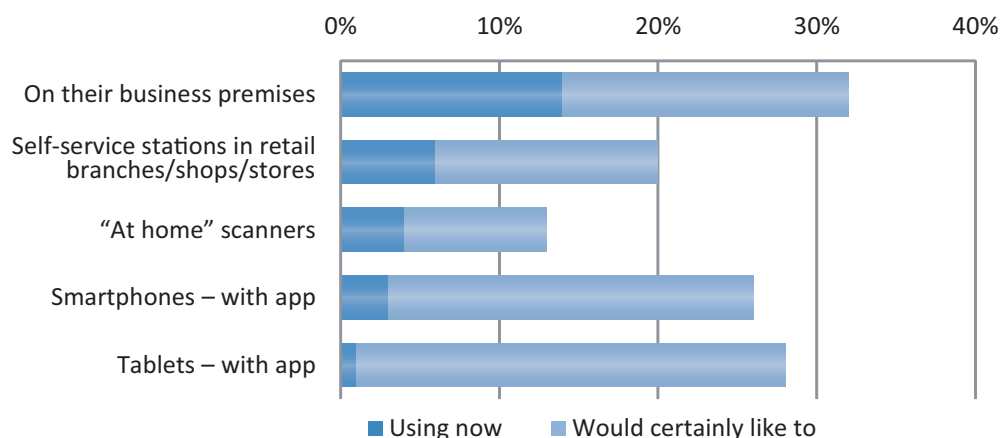
As we saw earlier in the report, many organizations have yet to introduce any form of data recognition and capture, and we can see in Figure 20 that this is a priority. Once this is in place, users will extend to on-premise distributed capture, and then out to remote, mobile and customer locations. This step-by-step approach is very wise, especially if the initial data capture system is procured on the basis that it has the capability to cover end-to-end connection with mobiles as needed.

Figure 20: What are your two immediate business priorities for capture and BPM?
(N=168, excl. 49 Don't Know)



Finally, we took a deeper look at specific plans to roll out customer or agent self-service capture to various devices. There is a strong interest (32%) in connecting directly with scanning devices on the customers' premises, with half (14%) already doing this. Despite the concerns over security, 28% would certainly like to extend capture direct to their customers' tablets, with a tablet app, but only 1% are currently doing so.

Figure 21: Do you plan to set up customer/agent self-service capture direct to your back-office process?
(N=199 inc. ~25% N/A)



Conclusion and Recommendations

Distributed capture is a mature technology, with nearly half of the user-base having some form of capture system within their core premises, generally linking to MFPs throughout the business, and in many cases including core-process scanners and digital mailrooms. There is, however, considerable scope to increase the level of data capture and forms recognition in order to reduce keying overhead, speed up processes and reduce manual involvement. For most organizations there is also value to be gained in extending the capture capability beyond the head-office to subsidiaries, branches and shops, moving capture closer to the point of origination. However, the two areas creating most interest are mobile capture for teleworking, travelling and field-based employees, and the extension of this to customer, citizen or agent self-service, whether in their homes, businesses, or on retail premises. For a significant proportion of organizations, this would be transformational for the business processes involved, dramatically speeding up response, while cutting frontline staff costs.

Extending processes beyond the firewall creates a number of issues, primarily security, but also the need for end-to-end integrity based on a “one touch” trigger to initiate the ingestion process, and a seamless transfer into the back-office system. Users are looking for assurance in these areas, as well as support for technical integration with core processes, and, of course, the need to accommodate multiple devices and tablets, with suitably capable on-device image processing capability.

Recommendations

- Audit your document-centric processes for the potential to improve customer response and increase productivity using scanning and capture. Extend this audit to subsidiaries and branches.
- Ensure that you are maximizing connectivity and resource sharing of scanning devices across the enterprise. This may best be achieved by implementing a distributed capture system connecting multiple scanning devices and MFPs to a central server.
- If you are not already recognizing data from documents and forms for indexing, auto-classification and process data-collection, investigate the potential improvements to process efficiency and end-to-end throughput.
- Look to provide one-touch process initiation from any of the connected devices across your system. Look beyond a single-process to the benefits for other processes in the organization.
- Next consider the potential benefits of extending this capability to your branch offices, shops, and possibly to self-service customer terminals, or web applications. Can this also be extended to your agents and suppliers?
- Now look to whether your staff, your agents, your case partners, and your customers could benefit from direct access to your back-end processes from mobile devices - scanning forms and signatures, inputting supporting documents, and triggering an immediate start to the down-stream processes.
- Before considering in-house developments and single-point solutions, look to extend your in-house capture system, or to other mobile-capable capture products. Evaluate them for security and audit conformance, end-to-end process integrity, process integration, and multiple device support.

References

- 1 AIIM Industry Watch, “Process Revolution – moving your business from paper to PCs to tablets” April 2012, <http://www.aiim.org/Research/Industry-Watch/Process-Revolution-2012>
- 2 AIIM Industry Watch, “The Paper Free Office – Dream or Reality” Feb 2012, <http://www.aiim.org/Research/Industry-Watch/Paper-Free-Capture-2012>

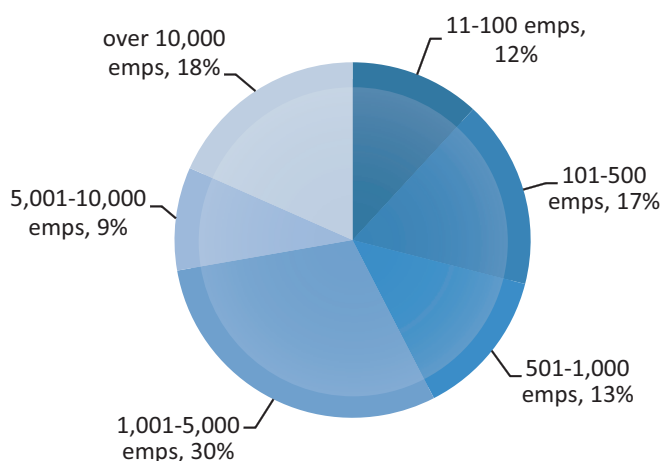
Appendix 1: Survey Demographics

Survey Background

The survey was taken by 245 individual members of the AIIM community between 11 and 29 May 2012 using a web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members

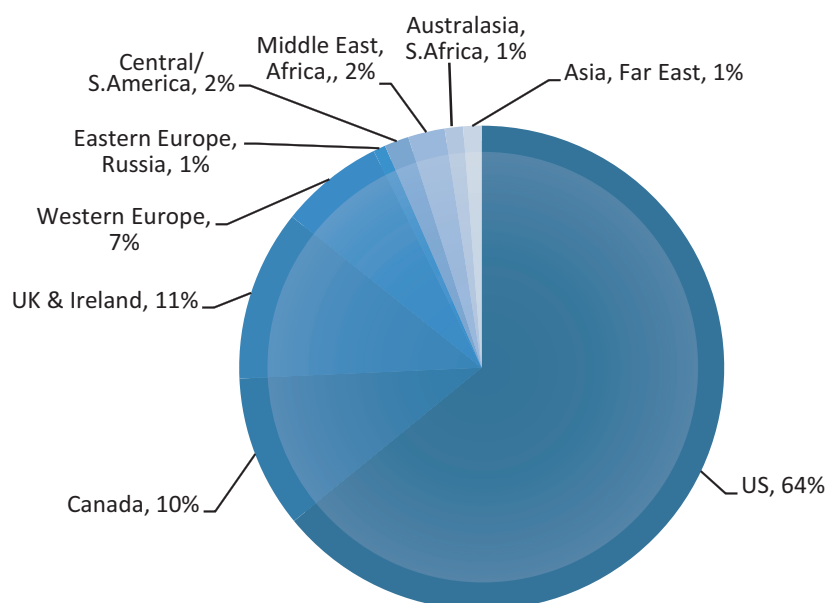
Organizational Size

Organizations with less than 11 employees are excluded from all of the results in this report, as are suppliers of ECM products and services. On this basis, larger organizations (over 5,000 employees) represent 27%, with mid-sized organizations (500 to 5,000 employees) at 43%. Small-to-mid sized organizations (10 to 500 employees) are 29%.



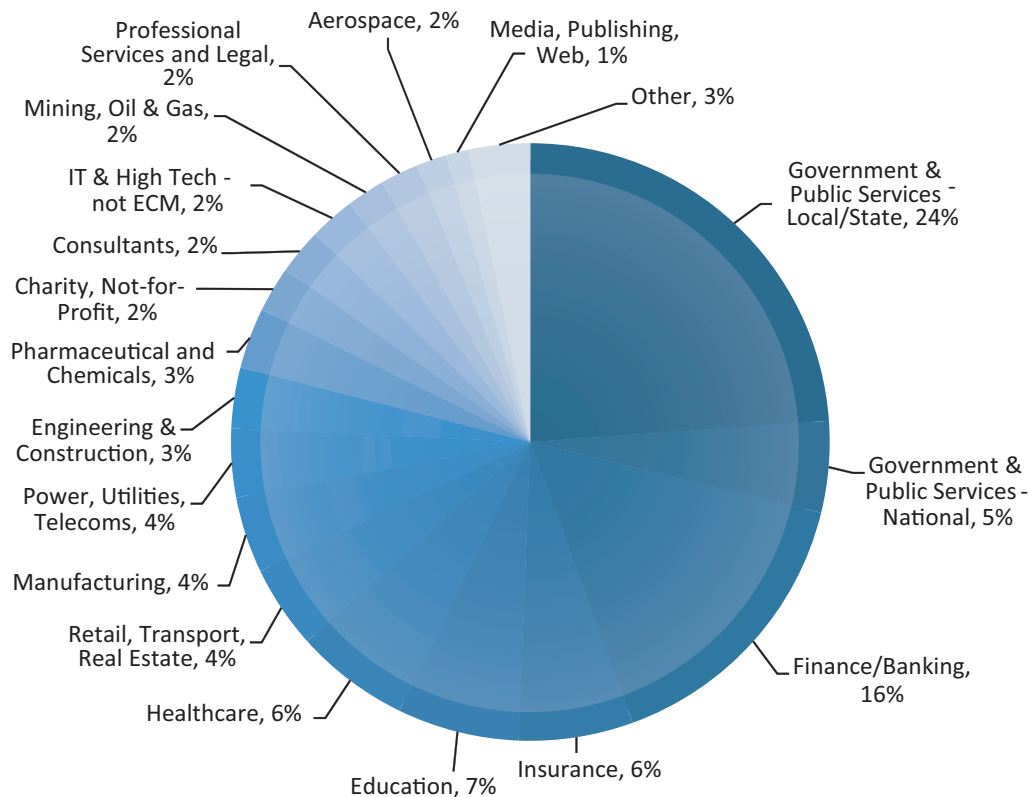
Geography

US and Canada make up 74% of respondents, with 18% from Europe.



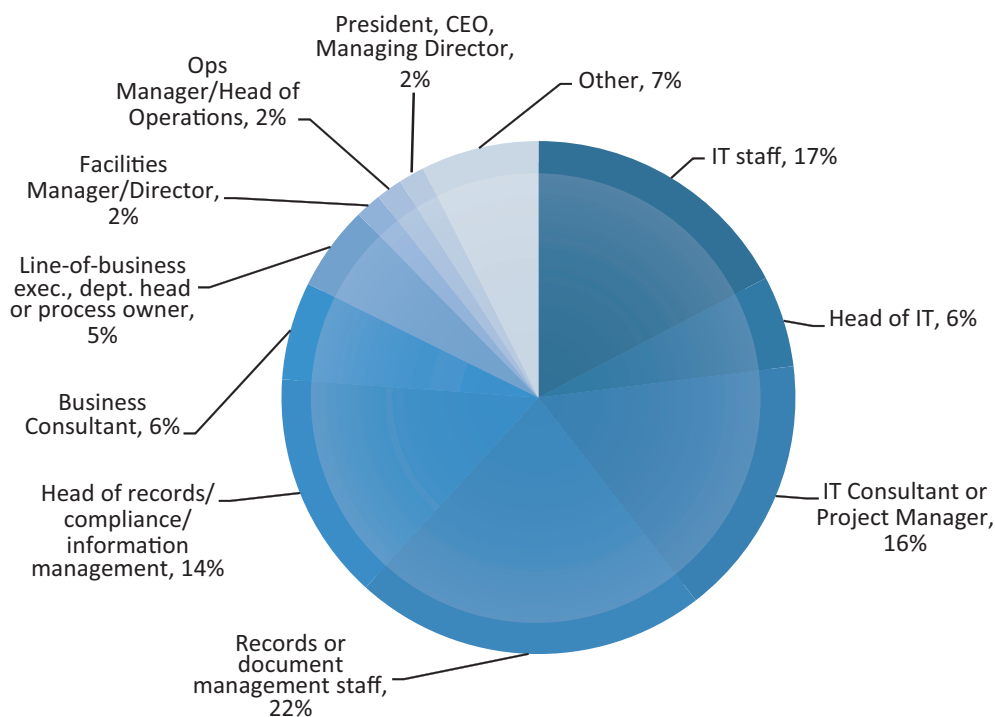
Industry Sector

Local government and public services represent 24% and national government 5%. Finance, banking and insurance represent 22%. These two together make up 50% of the survey, a much higher proportion than is usual within the AIIM demographic. The remaining sectors are evenly split.



Job Role

40% of respondents have an IT function, with records and information management disciplines at 36%. The remaining 24% are line of business managers or business consultants.



Appendix 2: Open ended comments (selective):

“Do you have any general comments to make about your distributed capture projects?”

- Mobile and remote scanning would be great for staff on the move and working at client offices who need to send information back to the base office. Also for the client to be able to log in and see the scans.
- Much needed and useful technology. It increases productivity.
- Mobile capture is a likely candidate for getting around the complexity of digital signatures from our customers.
- Security concerns really cause issues.
- Remote: issues are cost, training, support, and quality control.
- For Medical Claims, would like one solution for all the providers needing to send paper to insurance payer.
- We have close to 350 examiners in the field and would like to explore a better technology.
- I don't believe management is even aware that we could do this.

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