

# IIM Best Practices —

## Incorporating Intelligent Capture in Your Digital Transformation Strategy

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## About AIIM



Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant — we've always focused on the intersection of people, processes, and information. We help organizations put information to work.

AIIM is a non-profit organization that provides independent research, training, and certification for information professionals. Visit us at [www.aiim.org](http://www.aiim.org).



## About the author

John Mancini

John Mancini is a Past President of AIIM. He is a well-known author and speaker on information management and digital transformation.

As a frequent keynote speaker, John offers his expertise on Digital Transformation and the struggle to overcome Information Chaos. He blogs under the title Digital Landfill (<http://info.aiim.org/digital-landfill>), has more than 11,000 Twitter followers, 6,000 LinkedIn followers, and can be found on most social media as @jmancini77. He has published more than 25 e-books, the most recent being:

- [Automating Compliance and Governance](#)
- [How does the Office 365 Revolution Impact Governance and Process Automation?](#)
- [State of the Industry – Content Services](#)
- [Implementing A Digital Workplace Strategy](#)
- [Modernizing the Information Toolkit – Building an Effective Strategy for Content Integration and Migration](#)



## About AIIM's Industry Watch Research

Over two years ago, AIIM introduced the concept of Intelligent Information Management, or IIM, and began researching the connections between IIM and Digital Transformation.

AIIM's IIM roadmap provides the following key capabilities:

- **CONTENT SERVICES** – a flexible and modular approach that utilizes content and information wherever and whenever it is needed, independent of the legacy ECM preoccupation of where it is stored;
- **PROCESS SERVICES** – process tools that can be delivered with the simplicity of an app, but within a framework that allows the business to remain in control; and
- **ANALYTICS SERVICES** – automated tools to prepare ALL of its information – both structured and unstructured – for machine learning.

### Content Services

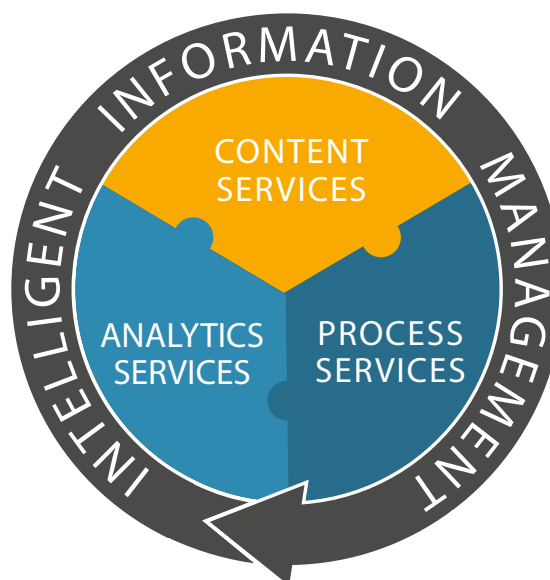
Multi-Channel Capture  
Content Migration, Integration,  
and Collaboration  
Document Management  
Records Management  
and Preservation

### Process Services

Business Process Management (BPM)  
Robotic Process Automation (RPA)  
Case Management  
Decision Management

### Analytics Services

Data Recognition, Extraction,  
and Standardization  
Metadata and Taxonomy Management  
PII Identification and Protection  
User Personalization



The term **SERVICES** is intentional in this definition, because a modern enterprise must be able to link these capabilities together on the fly to respond to a continually changing business environment.

Our 2019 Industry Watch research program looks at the impact of the rising tide of information chaos, its impact on the effectiveness of Transformation initiatives, and the adoption rates of core IIM technology building blocks. AIIM Industry Watch reports examine core IIM building blocks as well as the key issues that surround them:

- The key drivers motivating potential customers;
- Buying intentions and key purchase drivers during the next 12 months;
- Obstacles faced during the acquisition and implementation process; and
- Business results achieved through IIM technologies.

Our focus areas this year (with forecast release dates in parentheses) are:

- State of Industry – Content Services (March)
- Modernizing the Information Toolkit: Building an Effective Strategy for Content Migration and Integration (April)
- Implementing a Digital Workplace Strategy (June)
- Incorporating Intelligent Capture in Your Digital Transformation Strategy (July)
- You're working TOO hard – Using Intelligent Automation to Save Time, Money, and Effort (August)
- Accessible AND Secure – Best Practices for Automating Your Information Governance (October)
- Uncovering the Secrets to Success with Office 365 (November)

We value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool in late May 2019.

The survey sample was a mix of respondents from the AIIM population (in the AIIM database, but not necessarily AIIM members – about 25% of the total) and a sample of respondents completely independent of AIIM (about 75%). The respondents in the non-AIIM sample were directors, managers, and other decision maker respondents whose field of expertise was in Technology Implementation, Technology Development Hardware (not only IT), Technology Development Software (not only IT), and Executive Leadership.

A total of 232 individuals participated in the survey.

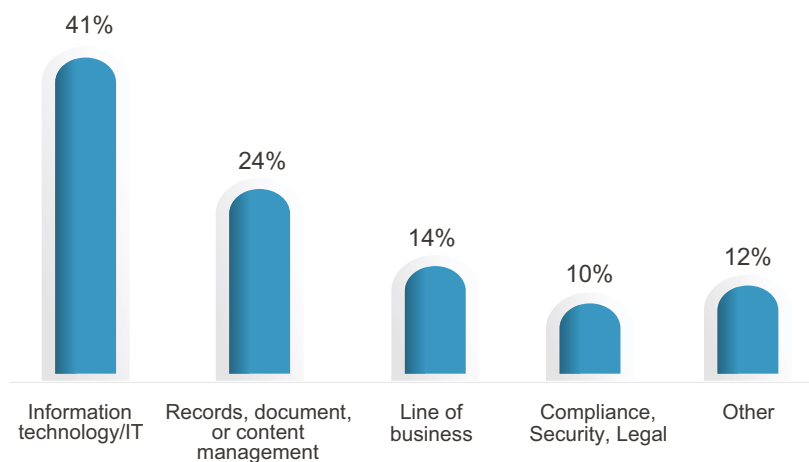
The core areas of responsibility for the survey participants were: 41% information technology/IT; 24% DM, CM, RM; 14% line of business; and 10% compliance, security, legal.

78% of participants were from organizations with > 100 employees; 35% from organizations with > 1000 employees. Organizations with less than 10 employees were excluded.

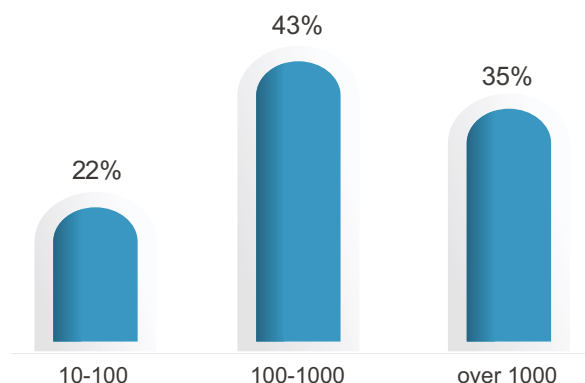
49% of the participants were from outside North America.

The largest industry segments represented in the survey were: 1) banking, finance and insurance; 2) high tech; 3) healthcare; and 4) retail, transportation, and real estate.

Which is the best description of the department in which you work?

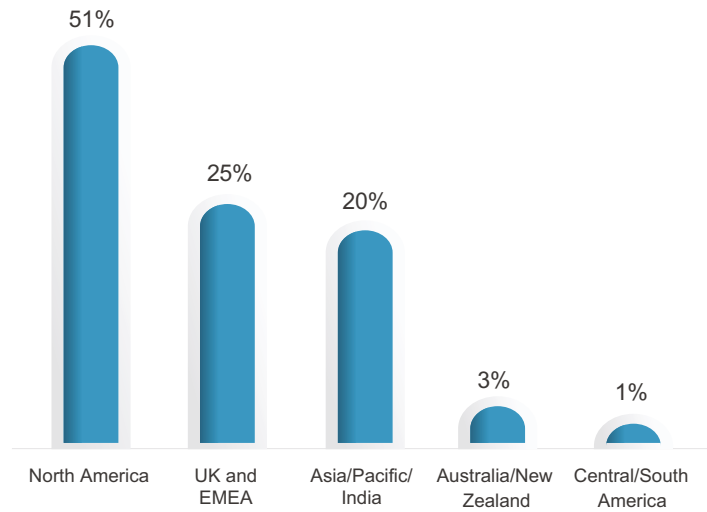


Approximately how many employees are there in your organization?

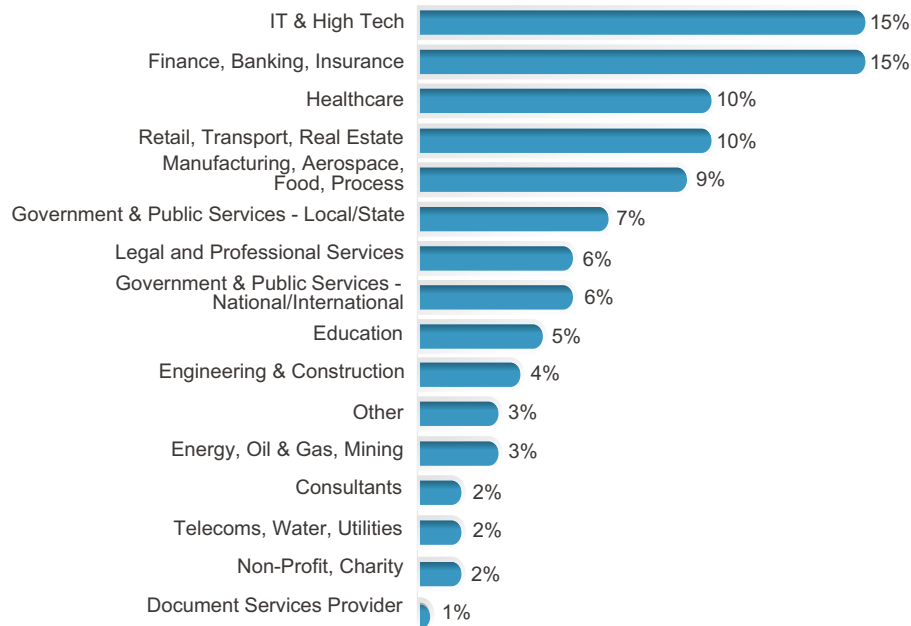




## Where is your organization headquartered?



## Which of the following best describes the primary business of your business of your organization?



We also asked respondents to self-assess the performance of their organization relative to other organizations in their peer group and score their performance as either “above average” (41%), “average” (49%), or “below average” (10%). Throughout this eBook, we have broken out some of the responses by these categories to establish the link between organizational performance and profitability and IIM maturity and effectiveness.

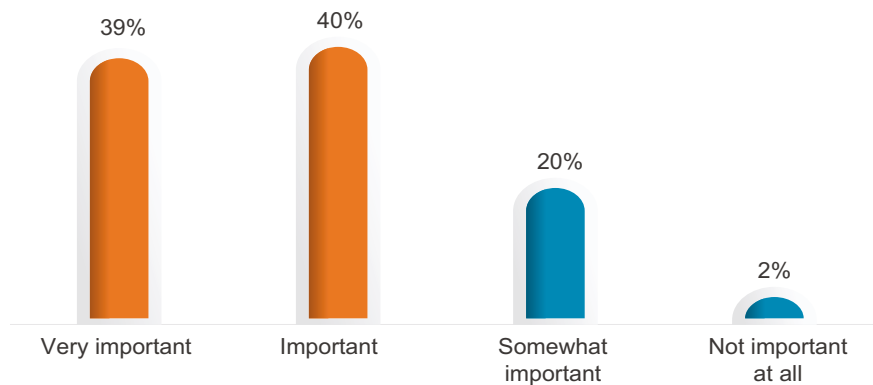
*Note: We have used selected data from previous AIIM market research reports to illustrate particular points. The specific reports used are footnoted. In the quotes section, we have listed the vertical industry of the source.*

## IIM Best Practices — Incorporating Intelligent Capture in Your Digital Transformation Strategy

*Every organization is on – or should be on – a Digital Transformation journey.*

79% of organizations realize that they must transform into a true digital business in order to survive. As the currency that fuels and funds the journey, information is an organization's most valuable asset.<sup>1</sup>

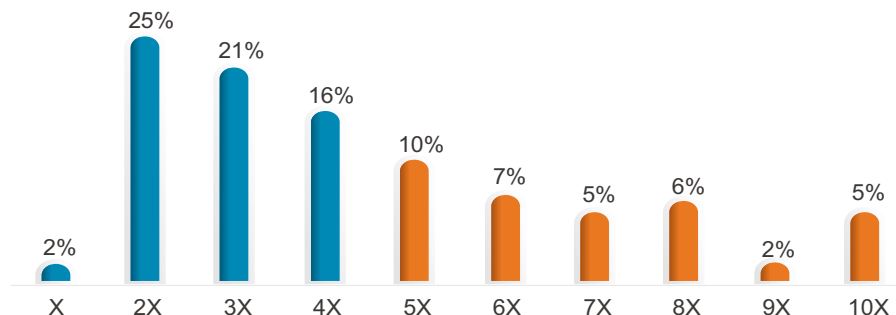
How important is DIGITAL TRANSFORMATION to your organization?  
**For 79%, Digital Transformation is key.**



This information is coming at organizations in increasing volumes, forms, and formats. The ability to intelligently capture this information in a consistent way and integrate it into automated business processes is a core element in Digital Transformation.

On average, organizations expect the volume of information coming into their organizations to grow from X to 4.2X over the next two years.<sup>2</sup> And most importantly for those who care about process automation, they expect over 60% of this information to be unstructured (like a contract or a conversation) or semi-structured (like an invoice or a form).<sup>3</sup>

Think about the huge amounts of data and information currently coming into your organization (call this current volume "X") -  
What do you predict this volume will be in 2 years?  
**The volume of information expected to grow from X to 4.2X.**



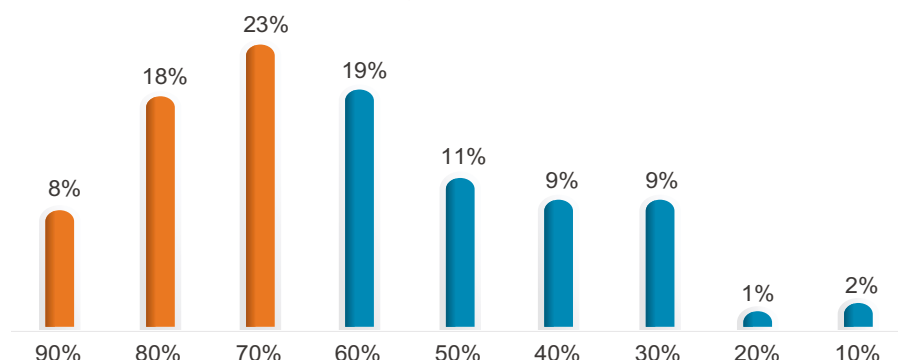
<sup>1</sup> AIIM, 2019, *State of the Industry – Content Services*, Overall N = 307

<sup>2</sup> AIIM, 2018, *Automating Governance and Compliance*, Overall N = 275

<sup>3</sup> AIIM, 2018, *Enhancing Your RPA Implementation with Intelligent Information*, Overall N = 226



Think about ALL of the information in your organization.  
What would be your best guess for the percentage of  
the total that is unstructured INFORMATION?  
**Over 60% of information sprawl is unstructured  
– i.e., content.**



This eBook looks at a key element in any information management modernization strategy – creating an intelligent capture strategy and the implications this carries for automating document intensive workflows.

For purposes of this research, we asked survey participants to use this definition of **Intelligent Capture**:

*Intelligent capture software automates the scanning and capturing of critical paper and electronic documents – such as invoices, contracts, claims, receipts and shipment documents – replacing manual input and processing. The captured content is then stored in an organized manner complete with metadata and classification. Once all that information is organized, it is analyzed and automatically processed using AI and analytics platforms.*

Adoption and utilization rates for these technologies vary widely. We focus on four best practices in this eBook:

- **Best Practice #1** – Once you get capture basics in place – more of a wish than a reality in most organizations – adopt a “land and expand” approach to intelligent capture.
- **Best Practice #2** – Thoroughly understand the problem set that intelligent capture can help address, and frame conversations in terms of problems to be solved rather than technologies to be deployed.
- **Best Practice #3** – Look “downstream” and understand the far-reaching implications that intelligent capture has on process efficiency and automation.
- **Best Practice #4** – Review the capabilities of your current and planned capture platforms to make sure they are evolving to meet the next generation of AI and Machine Learning challenges.



#### **Additional reading from Hyland:**

*Are inefficiencies feeding your efficiency solutions?*

*Your organization has invested in content and information management systems. But have you considered how data makes its way into these systems?*

*If you're using inefficient, error-prone capture processes and manual data entry, getting data into your automation solutions takes too long, resulting in outdated information that may be riddled with mistakes.*

*What can you do to make sure your information management investments can be fully utilized? Check out the information [HERE](#) to find out how a holistic capture solution can help.*

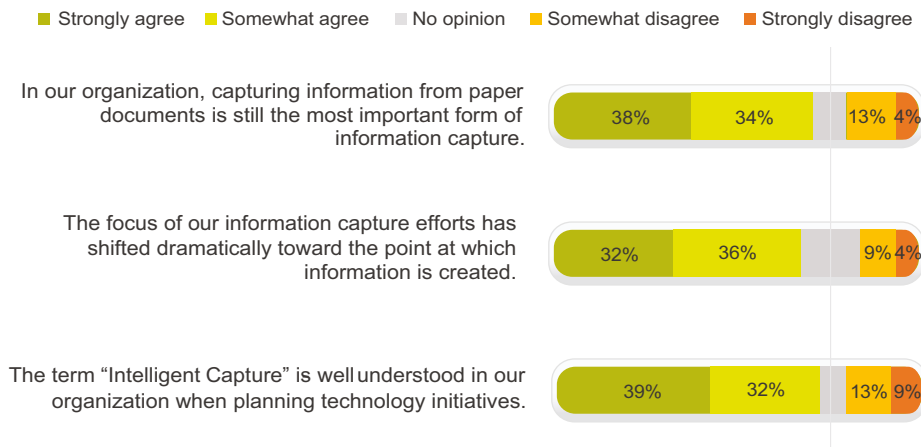
## Best Practice #1 – Once you get capture basics in place – more of a wish than a reality in most organizations – adopt a “land and expand” approach to intelligent capture.

Of all the use cases for capture, scan to archive is the most mature. For 72% of organizations, scanning paper is still the most important part of their information capture strategy. The persistence of the focus on paper is consistent across all levels of overall competence. 78% of organizations that describe themselves as “below average” relative to their peer group (laggards) say that “capturing information from paper documents is still the most important form of information capture,” as do 76% of “above average” organizations (leaders). Getting rid of paper remains a focus.

Many organizations are still evolving from a focus on scan to archive to one focusing on scan to process. Intelligent capture technologies are tightly connected to this evolution.

*“If you want your information or content to be controlled by an information management system, it must be made known to the system, otherwise it will remain in an unmanaged state.”  
(AIIM CIP Study Guide)*

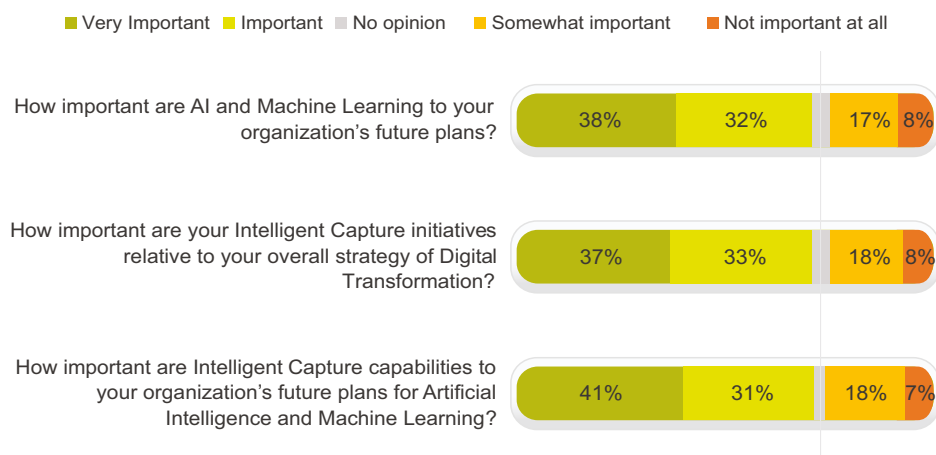
The core challenge for all organizations is to move beyond a focus on scan to archive. While getting rid of the paper and/or digitizing it is a necessary part of Digital Transformation, *on its own this is no longer sufficient to truly transform business processes.*



The good news is that organizations do understand that “capture” can be so much more than just scanning paper. 68% of organizations note that the focus of information capture has shifted in their organization from something that is often done after the fact (often for archiving purposes) to something that is done much closer to the point of information creation (largely for information entering from outside the organization) – as part of the launch of a business process. There is a clear divergence on this point between leaders and laggards. 80% of leading organizations agree that the focus of their information capture efforts “has shifted dramatically toward the point at which information is created.” Only 43% of lagging organizations feel similarly. In addition, lagging organizations tend to “not know what they don’t know” – only 30% of these organizations say the term “intelligent capture” is well-understood when planning technology initiatives, compared to over 80% at leading organizations.

*Like many organizations, we started late with capture – basically “dumb capture” with the goal of reducing paper storage. That was 5 years ago, and we still have no plan to address intelligent capture. Bad goals lead to bad outcomes. (Education)*

There is a “pull” in organizations to take basic capture capabilities and extend them as part of their broader transformation strategies. 70% of organizations see the link between AI and their future success. 70% understand that intelligent capture needs to be a key element in their Digital Transformation strategy, and 72% see the connection between intelligent capture and AI/Machine Learning.



## Where should you start? Here are 12 tips to get your capture basics in order (AIIM CIP Study Guide)

- **Identify sources of content to be captured** (e.g., paper, microfilm, email, born-digital, legacy sources such as file shares).
- **Explain the challenges associated with managing digital information** (e.g., determining what to capture and how, the dynamic nature of some digital information, how formats impact capture and management).
- **Select the appropriate file format for creating and capturing content based on business requirements** (e.g., target audiences, access to content over time, regulatory requirements).
- **Determine the impact of using proprietary file formats** on information creation, capture, and access.
- **Identify specific types of content to capture** that provide unique challenges (e.g., email, social media, forms, rich media) and determine how to capture them (e.g., using a digital asset management system).
- **Distinguish between structured and unstructured information** and the differences in how they are managed.
- **Determine methods for extracting and capturing data** from structured applications.
- **Determine methods for capturing structured data** using electronic forms.
- **Develop a process for capturing content** (e.g., what to capture, approvals, audits).
- **Determine strategy for capture** (e.g., day-forward, backfile conversion, on-demand, and factors that contribute to each).
- **Select the appropriate file format(s) for captured images** based on business requirements (e.g., number of pages, compression, need for Web-based access, need for public access, bandwidth).
- **Identify issues associated with file conversion** (e.g., between formats, from digital to analog).

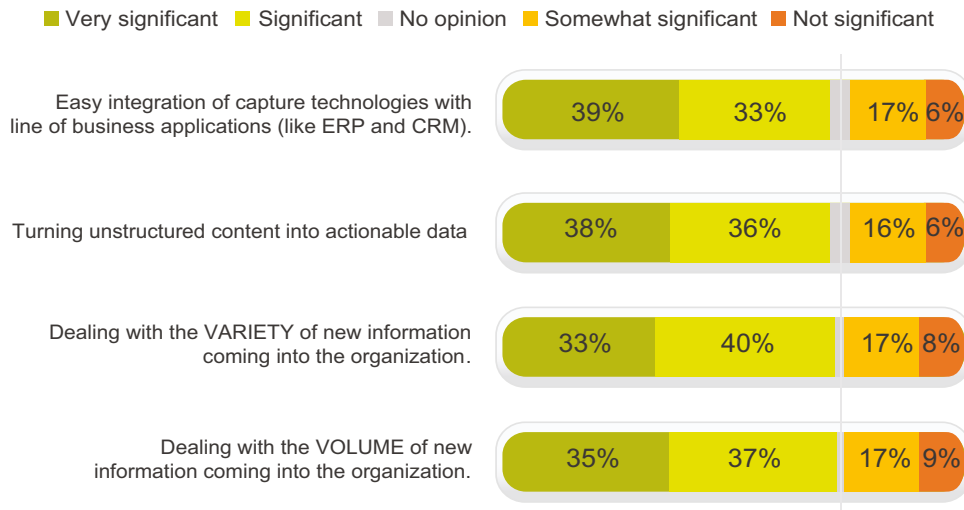
## Best Practice #2 – Thoroughly understand the problem set that intelligent capture can help address, and frame conversations in terms of problems to be solved rather than technologies to be deployed.

Intelligent capture technologies are uniquely positioned to help organizations address the problem set created by information chaos – the explosion in the formats, speeds, and volumes of information entering the organization. 82% of organizations see this rising volume of information as a significant problem, and 73% are also concerned about the explosion in information types.

*Our organization is risk averse and slow to change. Traditionally, a lack of leadership, will, coordination, and collaboration have disrupted efforts to adopt modern information management solutions. (State and Local Government)*

Many early-stage ECM and capture implementations very successfully focused on specific departmental processes. Organizations have struggled, though, to extend these content capabilities beyond their original focus. The increased interest in AI and Machine Learning technologies places a premium on the ability of organizations to effectively and intelligently capture critical business information. Content analytics plays a key role in addressing the “dark data” problem, and automated classification is critical in automating and accelerating business processes.

### How significant a problem is this?



Once again, organizations whose overall performance is above average have a better sense of the importance of addressing the business problems created by information chaos. Given the enormity of the immediate challenge facing organizations – information will grow from X to 4.2X, with over 60% of this unstructured or semi-structured – there are many lagging organizations that will likely be blindsided by the rapidly rising tide of information.

*We have an old capture solution and we are planning to replace it due to low accuracy, poor reports, and too many stages to process the documents. (Document Services Provider)*

% seeing this problem as significant	“Relative to peers, we are above average”	“Relative to peers, we are below average”
Dealing with the VOLUME of new information coming into the organization.	85%	48%
Dealing with the VARIETY of new information coming into the organization.	82%	65%
Turning unstructured content into actionable data.	72%	65%
Easy integration of capture technologies with line of business applications (like ERP and CRM).	80%	65%

*We receive copies of handwritten data that has already been submitted to a government agency – this is root canal without Novocain. (Banking, Finance, Insurance)*



## 7 ways to automate information capture (AIIM CIP Study Guide)

- By role or user
- By content type
- By work process
- Through workflows
- Through metadata values
- Through bulk import
- Through analytics



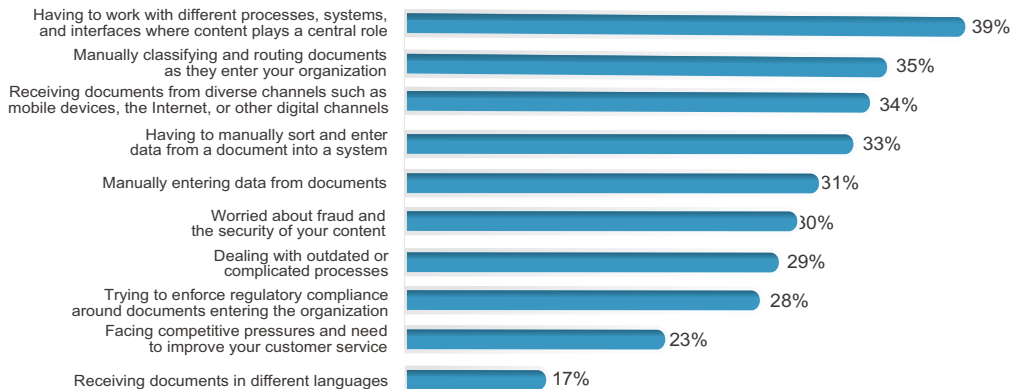
**Additional reading from Alaris:** [WORK AND THE FUTURE OF INFORMATION CAPTURE](#) *Digital transformation is a necessity. Learn how work will increasingly be optimized by information capture solutions.*

## Best Practice #3 – Look “downstream” and understand the far-reaching implications that intelligent capture has on process efficiency and automation.

At the core of the automation opportunity are document management challenges that still rely on manual processes. In the absence of intelligent capture, organizations must rely on expensive knowledge workers to be some combination of:

1. **system integrator** (39% cite working with different content-intensive processes, systems, and interfaces as a core challenge);
2. **file clerk** (35% cite manually classifying and routing documents); and/or
3. **delivery agent** (34% prioritize the challenges of receiving documents from diverse channels and devices).

### What are the THREE most urgent automated document processing challenges in your organization?



Leading organizations, particularly large ones, are now focused on broadening the scope of their automation efforts from traditional large-scale “BPM” process automation (although there is still plenty of opportunity within most organizations here) and democratizing these capabilities to a broader swathe of knowledge workers.

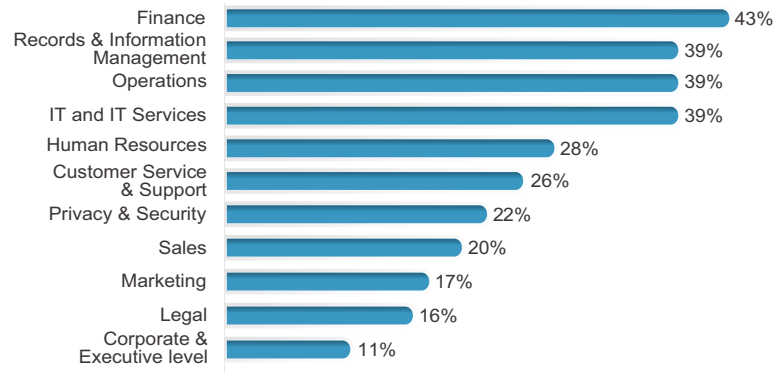
*Our procurement office had a successful pilot of intelligent capture of bids for services. Our biggest challenge is identifying the processes themselves. (Federal/National Government)*

This is where the potential intersection between RPA platforms and intelligent capture platforms becomes especially powerful, particularly in departments that have both large process volumes and large amounts of unstructured information and content tied to those processes. Intelligent capture plus RPA becomes particularly attractive in areas like finance, IT and IT services, operations, and information governance.

*We are at an evolving stage in using this technology. It will be of immense help in future times in every organization. (Legal and Professional Services)*



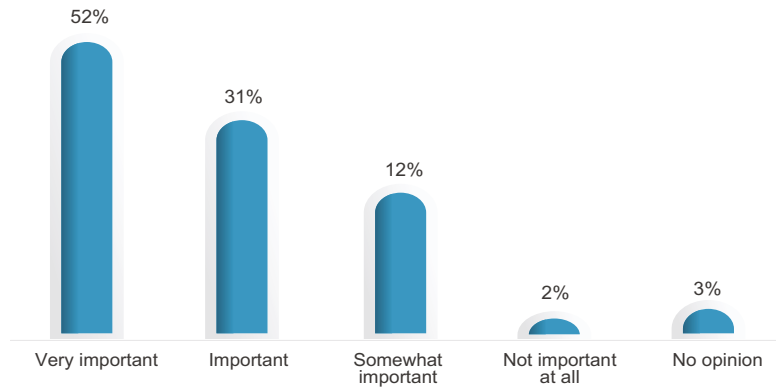
What are the THREE top departments in your organization in which intelligent capture capabilities would be MOST useful?



In these areas, delivering intelligent capture through simpler interfaces becomes an increasingly important capability. 65% of organizations say, “Our current capture solution is too complicated for a typical knowledge worker to use in an RPA environment.”

As organizations work to replace manual processes with automated ones, how exceptions are managed – how they are identified, when, and how they are handled – is critical. 83% of organizations place a high value on this capability.

When capturing business information, how important is it to get feedback from the business application (e.g., “There is a signature missing” or “A field has not been completed”) BEFORE the capture document gets submitted into the business process?



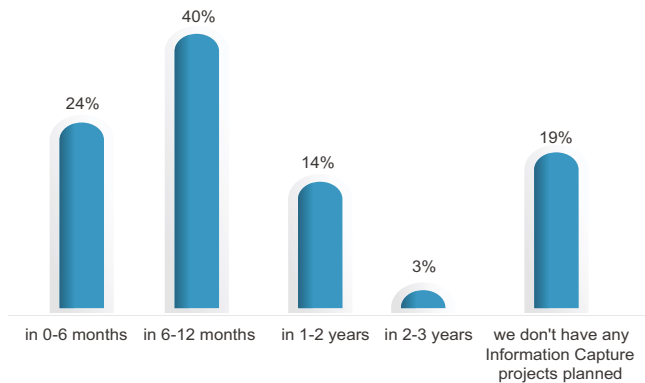
## 8 key benefits of Intelligent Capture

- Reduce labor costs
- Reduce knowledge worker drudgery
- Increase accuracy
- Increase process velocity and efficiency
- Improve compliance and auditability
- Reduce integration problems
- Set the stage for AI and Machine Learning
- Process consistency

## Best Practice #4 – Review the capabilities of your current and planned capture platforms to make sure they are evolving to meet the next generation of AI and Machine Learning challenges.

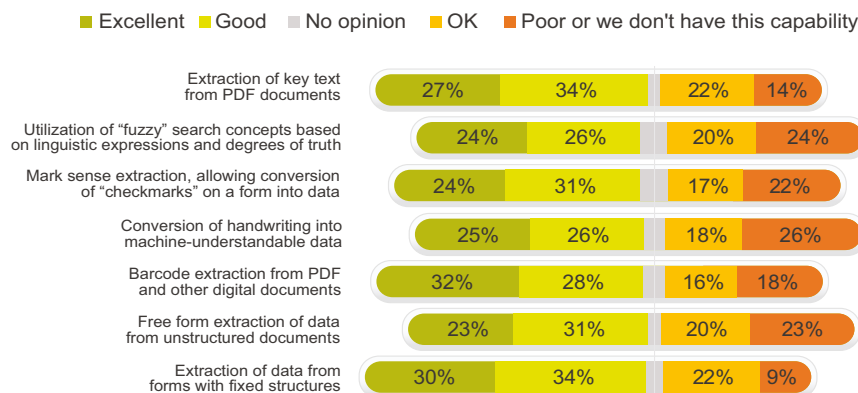
Expanding from “basic” capture to “intelligent” capture is clearly on the radar screen for most organizations. 64% of organizations are planning an intelligent capture project within the next year. The dichotomy between leading and lagging organizations is particularly pronounced with regards to their intelligent capture plans: 73% of leading organizations planning a project in the next 12 months, vs. just 26% of lagging organizations.

When are you planning your next significant intelligent capture project?



As organizations sort through their capture priorities moving forward, it is critical that they include emerging intelligent capture capabilities on their requirements list even if they are not needed immediately. There is a generational inflection underway with regards to capture capabilities, particularly those focused on AI, greater ease of use, and simpler integration into other business platforms. Significantly, 68% of organizations “feel their current capture solutions are falling behind where they need to be re Artificial Intelligence and Machine Learning.”

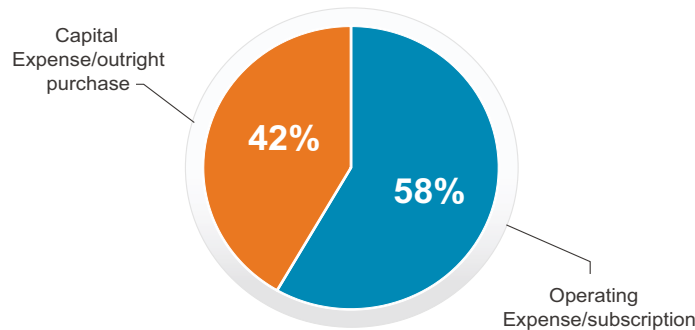
How would you evaluate your current organizational competence in each of the following intelligent capture capabilities?



*Our current biggest challenge is that the documents are scanned by others outside our organization. As such, image magnification is a problem. While we can manually crop and resize to attain the same magnification, we have not found a solution that would do it automatically – likely a machine learning solution exists. (Banking, Finance, Insurance)*

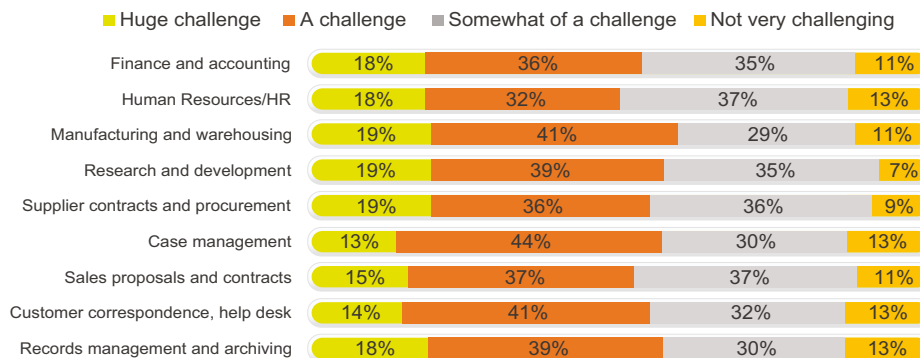
In addition, organizations are looking for simpler and more flexible ways to acquire intelligent capture capabilities. 58% of organizations would prefer to pay for these capabilities “by the drink” – as an operating expense – reflecting a broader trend toward SaaS and SaaS-like (consumption based) purchasing of what were previously enterprise purchases.

Does your organization prefer to pay for Intelligent Capture capabilities as a subscription (in other words, as an Operating Expense) or as an outright purchase (as a Capital Expense)?



Intelligent capture is also critical for organizations seeking to optimize the investments they are making in Robotic Process Automation (RPA) technologies. Across every core back-end business process, unstructured and semi-structured information (i.e., content) represents a significant obstacle to full automation. 70% of organizations say that unstructured information is the “Achilles’ Heel” of their RPA implementation.<sup>4</sup>

For each of the following processes, think about how much of a challenge structured and unstructured information represents in your efforts to semi-automate.



### 3 reasons why automated classification through intelligent capture is key to process acceleration (AIIM CIP Study Guide)

- Machine classification is often more accurate than humans. There’s a joke in information management that goes, “Ask 10 information management professionals to classify something and you’ll get 11 different answers.”
- Even where automated classification engines get something wrong, they will get it wrong consistently. This means it’s a process issue and can be readily addressed. When humans classify, their actions reflect their biases, their understanding or lack thereof, their attention to detail, and a host of other causes more difficult to troubleshoot.
- Automated classification provides consistency and transparency. It’s very easy to see why this document was identified as important and therefore captured, and that one wasn’t, by looking at the rules, the business logic, and the audit trails.

<sup>4</sup> AIIM, 2018, *Enhancing Your RPA Implementation with Intelligent Information*, Overall N = 226 (does not include those unfamiliar with RPA)

## 6 Reasons Intelligent Capture Needs to be a Digital Transformation priority.

Given the long history of capture technology – after all, “capture” has been part of the content management equation for over two decades – what truly keeps it relevant today and makes it a critical component of your Digital Transformation strategy? Here are 6 key reasons:

1. **The “information chaos” problem is accelerating.** The process of capturing and categorizing incoming information is critical to Digital Transformation effectiveness.
2. **This rising tide of information means that information capture must be done as information is created.** Capture is shifting from something that is done as an afterthought and with an archive focus to something that must be done as soon as information enters the organization.



**Additional reading from LEADTOOLS:** While eDiscovery is usually considered niche to the legal system, many of the same components and concepts can be applied to other intelligent capture systems that leading-edge companies are implementing. [Read this whitepaper](#) to see how LEADTOOLS can help you along every step of the capture process.

3. **Advances in AI and Machine Learning are changing the capture game.** Radical improvements in capture efficiency and accuracy are driving a reevaluation of legacy capture platforms.
4. **Increasing concerns about information privacy and security.** The growing complexity of privacy and security concerns means that organizations must: a) govern information from its creation; and b) automate the governance process.



**Additional reading from Parascript:** [This ebook](#) provides the results of the 2019 AIIM digital workforce survey underwritten by Parascript. It provides a view into what people are doing today, what they feel the roadblocks and opportunities are, and where things are headed in the future.

5. **Automated processing of information is critical to everything that follows.** Intelligent capture is assuming a key role in triggering and automating downstream business processes.
6. **Intelligent capture is key to fully optimizing emerging Robotic Process Automation (RPA) capabilities.** The ability of organizations to fully leverage their RPA investments rests completely on whether these engines can ingest and digest unstructured and semi-structured information.



**Additional reading from Kofax:** Organizations that work like tomorrow, employ [cognitive capture](#) to intelligently automate the acquisition, understanding and integration of all types of information across an organization, including unstructured data in documents and emails. Through cognitive document automation (CDA), which combines multichannel document capture (including mobile) and intelligent OCR, users have the power to quickly and accurately process any document of importance to any business.



01



of organizations say scanning paper is still the most important part of their information capture strategy.



06



of organizations say their current capture solution is too complicated for a typical knowledge worker to use in an RPA environment.



02



of organizations note that the focus of information capture has shifted in their organization from something that is often done after the fact (often for archiving purposes) to something that is done much closer to the point of information creation – as part of the launch of a business process.



07



As organizations work to replace manual processes with automated ones, how exceptions are managed – how they are identified, when, and how they are handled – is critical; **83%** of organizations place a high value on this capability.



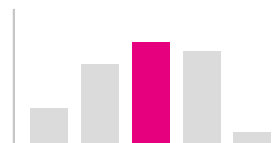
03



**70%** of organizations understand that intelligent capture needs to be a key element in their Digital Transformation strategy, and **73%** see the connection between intelligent capture and AI/Machine Learning.



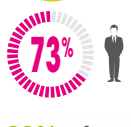
08



Expanding from “basic” capture to “intelligent” capture is clearly on the radar screen for most organizations. **64%** of organizations are planning an intelligent capture project within the next year.



04



**82%** of organizations see the rising volume of information as a significant problem, and **73%** are also concerned about the explosion in information types.



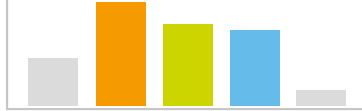
09



of organizations “feel their current capture solutions are falling behind where they need to be re Artificial Intelligence and Machine Learning.”



05



## Top 3 document processing challenges:

- 1) working with different content-intensive processes, systems and interfaces – **39%**;
- 2) manually classifying and routing documents – **35%**; and
- 3) receiving documents from diverse channels and devices – **34%**.

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## About Alaris, a Kodak Alaris business

Alaris is a leading provider of information capture solutions that simplify business processes. We exist to help the world make sense of information with smart, connected solutions powered by decades of image science innovation. Our award-winning range of scanners, software and services are available through our global network of channel partners.

For more information, please visit

[AlarisWorld.com](https://www.alarisworld.com)

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Hyland is a leading content services technology provider that enables thousands of organizations to deliver better experiences to the people they serve. Serving as a content services hub, we smartly surface content in context by connecting data and systems across the enterprise. By providing users with easy, secure access to complete information – anytime, anywhere, on any device – we enable organizations to digitally transform and facilitate more responsive, meaningful interactions. Find us at [Hyland.com](https://www.hyland.com).

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## Kofax

Kofax software enables organizations to Work Like Tomorrow™ - today.

Our Intelligent Automation software platform helps organizations transform information-intensive business processes, reduce manual work and errors, minimize costs, and improve customer engagement. We combine RPA, cognitive capture, process orchestration, mobility and engagement, and analytics to ease implementations and deliver dramatic results that mitigate compliance risk and increase competitiveness, growth and profitability.

Kofax provides a rapid return on investment for over 20,000 customers in financial services, insurance, government, healthcare, supply chain, business process outsourcing and other markets. Kofax delivers its software and solutions through its direct sales and services organization and more than 650 indirect channel partners and integrators in more than 60 countries throughout the Americas, EMEA and Asia Pacific.

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## LEAD Technologies, Inc.

LEAD Technologies is the developer and publisher of LEADTOOLS, the award-winning line of development toolkits. LEADTOOLS is a collection of comprehensive toolkits to integrate document, medical, multimedia, and imaging technologies into desktop, server, tablet, and mobile applications. LEADTOOLS offers development support for OCR, Barcode, Forms Recognition, PDF, Document Conversion and Viewing, Document Cleanup, Annotations, DICOM, PACS, HL7, Audio/Video Codecs, MPEG-2 Transport, DVR, Streaming, File Formats (150+), Image Compression, Image Processing, Color Conversion, Viewers, Special Effects, Scanning/Capture, Common Dialogs, Printing, and more.

LEAD Technologies also offers LEADTOOLS Cloud Services, a collection high-powered, scalable, and lightweight Web APIs that gives developers a hassle-free interface for integrating advanced recognition and document conversion into any application. With OCR, Barcode, Driver's License, Business Card, and Check Recognition engines, document and image conversion, document and image merging, and automatic image pre-processing routines, developers will get incredible accuracy and speed in one set of Azure-backed Web APIs.

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## OpenText

Information is every organization's most valuable asset. The most trusted information management solution is the only solution. OpenText Content Services builds on more than 25 years of pioneering innovation to include comprehensive capture, content management and archiving solutions, all available in the cloud, on-premises or in flexible hybrid configurations.

OpenText Content Services helps organizations connect content to their digital business and transform to become Intelligent and Connected Enterprises by enhancing:

### The Digital Workplace

- Enabling the preferred productivity methods of a new generation of knowledge workers—providing access to the information they want, when and where they want it
- Providing simple, intuitive tools that drive creation, sharing and collaboration inside and outside the company
- Delivering relevant content to users in context based on role and within the applications and interfaces they use for their daily tasks

### The Digital Business

- Extending into lead applications, such as SAP®, Salesforce®, and Microsoft®, to bridge siloes and speed information flows
- Applying metadata and governance rules—automatically and consistently—across diverse processes and media

- Introducing a framework to leverage AI and machine learning for analytics and management

### Governance and Security

- Automating lifecycle management—from creation to archiving and disposal
- Implementing industry and government compliance protocols to previously isolated pools of content
- Applying industry-leading security technology on both sides of the firewall
- Utilized by businesses and governments around the world, OpenText Content Services platforms are continually recognized as Leaders by the most respected analyst firms.

Learn more about OpenText Content Services at  
<http://www.opentext.com/ecm>

## Parascript



Parascript supplies the digital workforce with document automation solutions focused on transactions, information governance, fraud prevention and business processes. Parascript provides advanced capture leveraging machine learning with real-time adaptability and zero configuration. Our software offers easy-to-use, image-based analysis, classification, data location, extraction and verification. More than 100 billion documents for financial services, government organizations and the healthcare industry are analyzed annually by Parascript software. Parascript offers its technology both as software products and as software-enabled services to our partners. Our BPO, service provider, OEM and value-added reseller network partners leverage, integrate and distribute Parascript software in the U.S. and across the world. Visit Parascript at <https://www.parascript.com/> or visit us

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## Process Fusion

Process Fusion is a managed services and cloud application provider of Secure Information Exchange (SIX) and Business Process Automation (BPA) solutions.

Our solutions bridge the gap between the physical and digital world, by capturing and converting multi-channel inputs into actionable data, which can then be integrated into any system and further output into physical or digital forms.

At Process Fusion we are passionate about business outcome. Our goal is to help organizations automate critical business processes, increase process velocity, exchange information securely, and eliminate the inefficiencies and errors associated with manual and labor-intensive processes.

We recognize how important it is for organizations to secure and simplify their business processes, not just for the sake of compliance or efficiency, but to retain their clients trust and ensure they are fully satisfied and taken care of.

For further information visit

<http://www.processfusion.com>

and follow us

<https://www.linkedin.com/company/process-fusion-inc/>

Additional  
Reading



**Additional reading from Process Fusion:** To learn more about incorporating intelligent capture into your digital transformation strategy, download our white that will walk you through you how to transform the time-intensive task of manually capturing and processing documents into a fast & effective automated routine through our CP-1 OCR and machine learning platform. [Click Here](#)



# Success Begins with Setting a Solid Foundation



## Foundations of Intelligent Information Management Training Course

In this report, you learned how Capture represents the crucial first step in the information lifecycle. Getting it right sets a solid foundation from which to build the rest of your information management strategy. Are you ready for your next step?

AIIM's Foundations of Intelligent Information Management training course was designed to help you nail EVERY step in the information lifecycle, including:

- Creating and capturing information
- Extracting intelligence from information
- Digitalizing information-intensive processes
- Automating governance and compliance
- Implementing an information management solution

Click [here](#) to learn more and to start your learning today.





# LOOKING FOR YOUR NEXT STEP?

Do you have a question about this research? Would you like to discuss these findings with other members of AIIM?

[CLICK HERE TO JOIN THE ONLINE  
DISCUSSION](#)



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INFORMATION  
PROFESSIONAL

## What's Next?

The CIP Can Help You and Your Organization Navigate the World of IIM.

Now is not the time to wait on your Digital Transformation initiative. IIM practices and methodologies are critical to your success, and AIIM can help. Digital disruption calls for digital leaders with the skills and experience to optimize information assets and transform business. Become that leader now through **AIIM's Certified Information Professional (CIP)** program.

AIIM worked with industry experts and focus groups to define the body of knowledge necessary for information professionals to understand core IIM practice areas and methodologies, built a certification and test based upon this body of knowledge that is available at locations around the world, and created a set of training courses and materials to help information professionals prepare for the examination.

The path to CIP should be fairly simple for information practitioners who already have expertise and work experience. AIIM has a number of resources that can help practitioners at all levels prepare to become a Certified Information Professional:

- CIP Data Sheet
- CIP Exam Outline
- CIP Study Guide (free to professional members; nonmember fee is \$60 USD)
- AIIM Training Courses
- Online CIP Prep Course
- In-Person CIP Prep Classes
- Practice Exam

CIPs reflect a more integrated, more holistic view of information management. Changes in one process, technology, or practice invariably affect others in the organization. CIPs are able to see the forest and the trees and understand and plan for these outcomes. Because of this, CIPs will identify and understand changes that could cause compliance issues, thereby reducing liability.

Organizations that manage their information more effectively enjoy reduced costs, faster time to market, increased revenues and cash flow, and increased business agility. CIPs are uniquely positioned to help organizations achieve these benefits because they understand the interactions between different information intensive processes and activities.



Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant. We've always focused on the intersection of people, processes, and information. We help organizations put information to work.

AIIM is a non-profit organization that provides independent research, training, and certification for information professionals.

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