You’re Working TOO Hard – Using Intelligent Automation to Save Time, Money, and Effort

Incorporating Robotic Process Automation into Your Information Management Strategy
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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.

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- GDPR After the Deadline
- Automating Compliance and Governance
- How does the Office 365 Revolution Impact Governance and Process Automation?
- Enhancing Your RPA Implementation with Intelligent Information
- The State of Intelligent Information Management: Getting Ahead of the Digital Transformation Curve
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.

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, the adoption rates of core IIM technology building blocks, and IIM best practices.

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 Integration & Migration (April)**
- **IIM Best Practices – Implementing a Digital Workplace Strategy (June)**
- **IIM Best Practices – 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)**
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 June 2019.

The survey sample was a mix of respondents from the AIIM population (in the AIIM database, but not necessarily AIIM members – about 20% of the total) and a sample of respondents completely independent of AIIM (about 80%). 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: 68% information technology/IT; 13% DM, CM, and RM; 9% line of business; and 8% compliance, security, legal.

87% of participants were from organizations with > 100 employees; 39% from organizations with > 1000 employees. Organizations with less than 10 employees were excluded.

68% of the participants were from outside the United State and Canada.

The largest industry segments represented in the survey were:

- IT & High Tech
- Finance, Banking, Insurance
- Healthcare
- Retail, Transportation & Real Estate

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

- Records, document, or content management: 13%
- Line of business: 9%
- Information technology/IT: 68%
- Compliance, Security, Legal: 8%
- Other: 1%

Approximately how many employees are there in your organization?

- 10-100: 13%
- 100-1000: 48%
- Over 1000: 39%
In addition, during the survey, we asked respondents to self-assess the performance of their organization (“profitability” for companies; “effectiveness” for non-profits and governmental agencies) relative to other organizations in their peer group and score their performance as either “above average” (28%), “average” (59%), or “below average” (13%). Throughout this eBook, we have broken out some of the responses by these categories – describing these groups as “Leaders,” “Average,” and “Laggards” to establish the link between organizational performance and profitability and IIM maturity and effectiveness.

We asked a qualification question – “Are you familiar with your organization’s use of case management, business process management (BPM), robotic process automation (RPA) and decision management technologies?” – prior to initiating the survey.

We gave survey participants the following definitions prior to actually beginning the survey:

- Bring together all of the information about a customer or problem into a single view or case (Case Management).
- Model and automate multiple complex processes within a common framework or methodology (Business Process Management, or BPM).
- Reduce the burden of simple and repetitive manual tasks by having software mimic the tasks done by human workers (Robotic Process Automation, or RPA).
- Treat decisions as definable and reusable business assets and use technology to standardize key decision points (Decision Management).

We have also used data from previous AIIM market research reports to illustrate particular points. The specific reports used are footnoted.
Connecting the Dots Between Content Services and Process Services

Every organization is on – or should be on – a Digital Transformation journey. 79% of organizations realize that they must transform into true digital businesses in order to survive. As the currency that fuels and funds the journey, information is an organization’s most valuable asset.1

How important is DIGITAL TRANSFORMATION to your organization?

For 79%, Digital Transformation is key.

A rising tide of information chaos and confusion imperils these desired Digital Transformation journeys. The volume, velocity, and variety of information that most organizations need to manage, store, and protect now exceeds their ability to even marginally keep pace with big content challenges.

On average, organizations expect the volume of information coming into their organizations to grow from X to 4.2X over the next two years.2 And most importantly for those who care about Content Services and Process Services, 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).3

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.
As a result, there is a growing disconnect in organizations between their desire for process automation and the information that is needed to drive those processes. 54% of the information needed within a particular business application is stored within the application itself rather than within a dedicated content repository, a percentage that has remained remarkably consistent over the past five years. These kinds of content integration failures make it very difficult for process workers to view content in context, a prerequisite for business effectiveness. In 75% of organizations, simply managing the documents and content necessary for process workers to get their job done is a problem.5

How significant a problem is this for your organization? - Managing the documents and content necessary for knowledge workers to get their jobs done.

Getting the right information to the right person in context a problem for 75%.

27%
48%
23%
3%

A significant problem
A problem
Not a problem at all
No opinion

The intersection between Content Services (multi-channel capture, content integration and migration, document management, and records management and preservation) and Process Services (case management, business process management, robotic process automation, and decision management) is a critical one on the journey to Digital Transformation. A failure to map this intersection will result in siloed processes and content repositories that handcuff even the most well-intentioned efforts to transform customer journeys and enhance customer experiences.

“A big challenge is the maturity of the business and its processes. It’s hard to automate when processes are not standardized.” [Finance, Banking, Insurance]

Per AIIM’s CIP Study Guide:

Organizations that work at “the speed of paper” are increasingly being rendered non-competitive and irrelevant. We work and live today in an age where ubiquitous broadband internet and ever-more-powerful mobile devices combine to let workers work where, when and to some extent how they want to. But this means more than simply scanning paper and leveraging email in support of digitization initiatives. Rather, we think it calls for a fundamental rethinking of how we approach key business outcomes. It requires that information be digitized and that work processes be developed, or reworked, with a focus on digital first and automation wherever possible. And it requires that organizations adopt a posture of agility and responsiveness rather than one of passivity and reactivity.

Leading organizations understand these core Intelligent Automation best practices:

1. Start with a realistic assessment of the current state of automation in your organization.
2. Integrate process automation initiatives with your efforts to tackle the rising tide of information chaos. And vice versa.
3. While immediate cost savings are an important immediate benefit of process automation, don’t neglect to educate the C-Suite on the strategic benefits as well – data quality, information security, and improved customer experiences.
4. Embrace the next generation of process services to leverage your existing ECM and BPM investments.

1AIIM, 2019, State of the Industry – Content Services, Overall N = 307
2AIIM, 2018, Automating Governance and Compliance, Overall N = 275
3AIIM, 2018, Enhancing Your RPA Implementation with Intelligent Information, Overall N = 226
4AIIM, 2018, Meeting the Challenge of Digital Transformation, Overall N = 366
5AIIM, 2019, IIM Best Practices – Implementing a Digital Workplace Strategy, Overall N = 206
1. Start with a realistic assessment of the current state of automation in your organization.

The reality facing most organizations is that despite many well-intended efforts, process automation lags far behind where organizations would like it to be. Typically, two-thirds of organizations report that their core back-end processes are less than 50% automated.

How would you describe the degree of automation that CURRENTLY exists in each process in your organization?

Automation challenges are present for organizations at all performance levels, even for those that self-identify as “above average” relative to their peers (in our research, the “Leaders”), and is particularly evident in self-described low-performing organizations (in our research, the “Laggards”). Organizations who performance is below average typically report that their back-end processes are at least 75% manual – a deep challenge for them as digital disruption accelerates.

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15 Questions to Troubleshoot a Business Process
(Source: AIIM CIP Study Guide)

1. Is the process flow correct, efficient, effective, and adaptable?
2. Is there evidence of obvious defects in the process?
3. Do we have unnecessary sign-offs and approval activities in the process?
4. Who is accountable for the process?
5. What metrics are there and are they sufficient and informative to define the expected outcomes?
6. Is there one standard way of working, or does each knowledge worker do things differently?
7. Are all the steps really necessary?
8. Are we asking for data we don’t need?
9. Are the hand-offs between various process elements and tasks smooth?
10. Is there a good communication path between process steps?
11. Do the people undertaking the tasks understand and follow the documented process?
12. Are there major bottlenecks in the process, areas where things slow down?
13. Is there clear and logical input and output to each step?
14. Have you considered how else could this process step be accomplished?
15. How do exceptions impact the overall process?
There are many reasons why efforts to automate are so problematic. But at the top of the list is the reality that across every core back-end business process, unstructured and semi-structured information (i.e., content) represents a significant obstacle to full automation.

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

![Challenges and Opinions Table]

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

How significant a problem is this?

- Very significant
- Significant
- No opinion
- Somewhat significant
- Not significant

Easy integration of capture technologies with line of business applications (like ERP and CRM).

- 39% Very significant
- 33% Significant
- 17% No opinion
- 8% Somewhat significant
- 6% Not significant

Turning unstructured content into actionable data.

- 38% Very significant
- 36% Significant
- 16% No opinion
- 6% Somewhat significant
- 0% Not significant

Dealing with the VARIETY of new information coming into the organization.

- 33% Very significant
- 40% Significant
- 17% No opinion
- 8% Somewhat significant
- 0% Not significant

Dealing with the VOLUME of new information coming into the organization.

- 35% Very significant
- 37% Significant
- 17% No opinion
- 9% Somewhat significant
- 0% Not significant

This core unstructured content challenge – a long-standing one for those in the content management space – is one that cannot be solved by RPA (Robotic Process Automation) technologies alone. Although RPA does a great job automating rote and repetitive processes, a failure to build a strategy to incorporate unstructured and semi-structured information into RPA capabilities will lead to suboptimal results and a continued reliance on manual intervention in automated processes.

“After two failed RFPs for an ERP solution, our company hired an IT consulting firm to tell us what we should have known – we weren’t ready. Too many processes are manual and paper. We have not addressed siloed information or adopted born digital/stay digital practices. There’s too much unstructured data and the knowledge base has not been built to move forward, only to keep doing what we’ve always done.” [Government & Public Services – Local/State]
The high % of unstructured information engulfing business processes is important for optimizing RPA because this information must be turned into structured data for RPA engines to be effective. Two out of three organizations say that “Documents create problems for most RPA tools” and 70% say “Unstructured information is the Achilles’ Heel for many RPA implementations.”

### 3 Main Drivers for Process Change
(Source: AIIM CIP Study Guide)

1. **Changes to the marketplace.** Consider the Fortune 500 – the list of the largest companies in the U.S. by total revenue. Since the original list was published in 1955, more than 400 of the corporations on that list no longer exist, at least in the same form. Competitive pressures in the marketplace don’t just come from other competing organizations, but also from changes in how consumers use and perceive the marketplace.

2. **Changes to legal or regulatory requirements.** Organizations are required to comply with these or face penalties and other liabilities. One of the more pressing issues today is privacy and protection of personal data – in just the last few years we’ve seen a number of changes to privacy regulations around the globe, requiring any organization that collects or processes personal data to review and potentially overhaul any process that relies on it.

3. **Changes to technology can displace previous technologies very quickly.** Netflix and others won over Blockbuster for many reasons, but a large part had to do with the ability to stream media and movies directly to consumers courtesy of ubiquitous broadband internet, ever-increasing data speeds, and mobile device capabilities. But something as relatively simple as moving from “wet-ink” to digital signatures can significantly streamline business processes.

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**Additional reading from Vidado:** Turn previously inaccessible data into your differentiator through AI. Download the following [white paper](#) to learn: How the top tech and finance businesses are leveraging their proprietary data, how to overcome challenges in constructing useful datasets, and how businesses are implementing AI to access this data.

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6AIIM, 2018, Enhancing Your RPA Implementation with Intelligent Information, Overall N = 226


8AIIM, 2018, Enhancing Your RPA Implementation with Intelligent Information, Overall N = 226
3. While immediate cost savings are an important immediate benefit of process automation, don’t neglect to educate the C-Suite on the strategic benefits as well – data quality, information security, and improved customer experiences.

Process automation has traditionally been directly associated with increased efficiency and reduced costs. And while these drivers are still important, it is also critical to position intelligent automation as a strategic initiative addressing C-level customer experience (CX) concerns.

The top drivers for undertaking a process automation project – 1) improving data quality; 2) reducing manual errors; and 3) improving customer service – are clearly tied to the creation of seamless customer experiences. A failure to address these underlying concerns can often result in a CX “veneer” that can prove especially frustrating to customers once they penetrate the veneer and encounter ugly and manual back-office processes.

Given that organizations cannot pursue an endless list of automation priorities, focus is important. The top ranking of finance, accounting and invoice processing is not surprising; this area has long been one of the most popular areas for automation given the manual nature of many financial processes, the ripple effect that finance has across the efficiency of other processes, and the increasingly strategic role that finance plays in Digital Transformation initiatives. This top ranking is consistent across all levels of performance – Leading, Average, and Lagging.
Given that 80% of those surveyed were from outside the AIIM community, the relatively high ranking of records management and preservation as an urgent target for process automation is at first glance perhaps surprising. It likely is driven by the rising tide of information chaos and the resulting desire to move away from many traditional manual records and governance processes. This automation challenge goes deeper than the inability of organizations to extract value from their information; most have failed to automate the task of even getting rid of the junk. Over 60% of organizations are still stuck with mostly manual approaches to retention and disposition management or have just given up and save everything. The problem goes beyond ROT (Redundant, Obsolete, and Trivial content) to the basic management of document metadata. Two out of three organizations cannot even easily identify basic metadata like the owner and version for over 50% of their documents. 

“I feel the adoption of process automation technologies is proving difficult, time consuming, and a lot of headaches for all involved.” [Education]

Problems associated with the information “risk” side of the process equation are particularly pronounced among laggard organizations.

<table>
<thead>
<tr>
<th>Most urgent top three “horizontal” automation targets</th>
<th>Leaders</th>
<th>Average</th>
<th>Laggards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records management and preservation</td>
<td>23%</td>
<td>32%</td>
<td>43%</td>
</tr>
<tr>
<td>Customer correspondence, helpdesk</td>
<td>25%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Sales proposals and contracts</td>
<td>16%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Compliance reporting</td>
<td>20%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>eDiscovery and legal</td>
<td>13%</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Supplier contracts and procurement</td>
<td>12%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Research and development</td>
<td>26%</td>
<td>21%</td>
<td>10%</td>
</tr>
<tr>
<td>Human resources</td>
<td>17%</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>Finance, accounts payable, and invoice processing</td>
<td>36%</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>Facilities management and maintenance</td>
<td>26%</td>
<td>22%</td>
<td>13%</td>
</tr>
<tr>
<td>Logistics (deliveries, manifests)</td>
<td>26%</td>
<td>35%</td>
<td>40%</td>
</tr>
<tr>
<td>Citizen Services (requests, approvals etc.)</td>
<td>22%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Customer onboarding and servicing</td>
<td>38%</td>
<td>25%</td>
<td>27%</td>
</tr>
</tbody>
</table>

**Additional reading from K2:** Companies large and small are looking for ways to streamline how they connect and manage information across various line-of-business (LOB) systems regardless of where the data originates. Discover how content services and process automation are being used across a number of different use cases in the eBook “Combining Content and Digital Process Automation into a Powerful business Optimization Engine.”
Processes are actually more complicated than they first appear, requiring an integrated approach. For example, consider the following “sub processes” within Financial Services that must be integrated within an overall automation strategy.

1. Account audit requests
2. Branch risk monitoring
3. Check approvals and processing
4. Claim repairs
5. Credit card signup
6. Customer communication
7. Customer complaints
8. Customer onboarding
9. Deductible payment
10. Direct debit cancellations
11. Dispute resolution
12. Employee data management & integration
13. Fraud account closure
14. Internet application processing
15. Lost/stolen card management
16. Marketing campaigns
17. Modify address details
18. Modify direct debit details
19. Payments terms administration
20. Personal account closures
21. Personal loan applications
22. Regulatory compliance reporting
23. Statement reconciliation
24. Wire transfer

*AIIM, 2018, Automating Governance and Compliance, Overall N = 275*
4. Embrace the next generation of process service capabilities to leverage your existing ECM and BPM investments.

There is widespread interest in the four core process services technologies – case management, business process management, robotic process automation, and decision management. Given a choice between “important,” “nice to have,” and “don’t care,” it is not surprising that business process management and case management – the most “mature” of the process services technologies – are viewed as top priorities.

Survey participants report a high degree of satisfaction with these technologies among those that have already deployed them, and high interest among those who have yet to do so.

Those with an existing solution were asked to rate their satisfaction on the following scale: 1 for extremely satisfied, 2 for satisfied, 3 for somewhat satisfied, and 4 for unsatisfied.

There is significant ongoing interest in these technologies, with 50% of those surveyed typically either actively looking for a solution or exploring their options.
RPA and Decision Management are likely to get increased focus over time, particularly as organizations seek to leverage and modernize their existing capabilities. In the first wave of process automation, organizations focused on large-scale, mission-critical, document-intensive processes. The BPM and ECM capabilities used to solve this first generation of problems tended to be expensive, complicated, and had long implementation cycles, but this didn’t matter that much because the problems these capabilities solved were so critical.

“We’ve experienced improved communication between different areas, a reduction in unnecessary emails, the possibility of monitoring processes, and increased management capacity.” [Finance, Banking, Insurance]

For many organizations, these core back-office automation challenges remain. But those with existing investments in BPM and ECM technologies are now looking for new and additional process platforms beyond traditional BPM and ECM that are nimbler, more agile, and more easily deployed by the business to tackle the next wave of process challenges. Forrester talks about deep processes (“BPM grew up handling complex, long-running processes”) and wide processes (“the long tail of applications that codify the dozens, if not hundreds, of manual processes that can trip up customer experiences”). Both are important.

Organizations typically find that RPA and low-code platforms can not only help extend the life of existing BPM and ECM investments, but can also more broadly distribute process automation capabilities throughout the organization. This drive toward empowering “citizen developers” – business analysts working in concert with IT, but not totally reliant upon them – is an important long-term trend.10

How important is the concept of “citizen developer” to your organization’s process improvement plans?

71% of organizations see the concept of a “citizen developer” as important

Is this a good process for RPA? Do the workers in the process:

1. Perform structured, repeatable, computer tasks, such as data entry?
2. Make simple decisions based on predetermined rules?
3. Need to access multiple systems to accomplish a task?
4. Need to search for, aggregate, or update information?

10AIIM, 2018, Integrating Content Services into Low-Code Applications, Overall N = 188.
A C-Suite Checklist –
Nine Core Benefits of Process Automation

As you think through how to structure and position Intelligent Automation initiatives in your organization, make sure to properly position both the strategic and the tactical benefits of process automation. Here are a few ideas from the AIIM CIP Study Guide:

- **Time savings.** If a manual, paper-based process takes 2 hours to complete, and automating it reduces that time to 15 minutes, that’s an hour and 45 minutes saved per. That means the same number of employees can complete many more transactions in the same time period.

- **Cost savings.** Time is money, and time saved is money saved.

- **Reduced error rate.** Every time a human touches a process, it’s an opportunity to make a mistake: forgetting to include something, accidentally entering a wrong value, etc. Fewer errors means time savings means cost savings; it also reduces the likelihood of poor customer satisfaction, increased liability, and so on.

- **Consistency of process execution and process outcomes.** If you automate a process end-to-end, you can ensure that no steps were missed, everything is there, all the metadata has been filled in, etc.

- **Increased process transparency.** You can’t manage what you don’t measure, and manual processes are often hard to measure meaningfully. In an automated process there will be metrics and reporting that show what’s going on with the process as a whole and with the individual instances of that process.

- **Improved workload balancing.** Automated processes can be set up to feed into work queues. From here the next task could go to the next available operator, or it could be assigned to the best available resource for processing. If a process has some exceptions that causes it to slow down, the queue can automatically move to the next available resource so there is no bottleneck behind this one.

- **Better allocation of staff resources.** Many steps in a given process are mundane ones like looking up data in one system or copy/pasting data from one system into another. These don’t require creativity, insight, or even though most of the time and certainly aren’t particularly fulfilling to the employees performing them. Automate those processes and those tasks through tools like RPA and free up staff to do more creative and innovative things.

- **Increased customer satisfaction.** In the digital age, customers don’t want responses at the speed of paper, and they don’t want manual processes that could provide them incorrect information because something was missed or processed incorrectly.

- **Increased accountability.** Similarly, automation tools can provide insight about how particular staff members or departments or shifts are performing and where there might be opportunities for quality or performance improvements.

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**Additional reading from OpenText:** DHFL Pramerica Life Insurance Co. Ltd. (DPLI) is one of India’s most progressive life insurers. DPLI looked to OpenText to complete a large-scale transformation project to digitize its key business processes. This story describes how they digitized multiple end-to-end business processes, decreased transaction time, and reduced processing costs by 25–30%.
Most urgent back-office process automation priorities – finance (35%), logistics (34%), records management and preservation (30%).

In a typical low-performing organization, more than 75% of each core back-office process is a manual process.

In over 50% of core back-end business processes, unmanaged unstructured content remains a significant problem.

New potential customers actively looking for a Process Services solution – case management (22%), BPM (22%), RPA (19%), and decision management (20%).

Agree – “Easy integration of capture technologies with line of business applications like ERP and CRM is a problem.”

71% of organizations see the concept of “citizen developer” as important to their process automation plans.

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