

So, what are the characteristics of capture leaders in addressing these challenges?

## 1

**Leaders push the envelope on automation and machine learning.**

AIIM has identified four key intelligent information practice areas and methodologies that are critical to Digital Transformation: 1) modernizing the information toolkit; 2) digitalizing core organizational processes; 3) automating compliance and governance; and 4) leveraging analytics and machine learning.

When asked organizations where they plan to increase their investment in the next 18-24 months, the top organizational priority -- among 51% of organizations -- was *leveraging analytics and machine learning*. This reflects the realization that traditional ways of managing the information chaos problem are simply not working. But the top ranking also ties to the fact that core analytics and machine learning capabilities -- content analytics, semantics, intelligent document classification, and automated data extraction and standardization -- *are critical to everything else that follows*. Without these competencies, Digital Transformation efforts -- no matter how well intentioned -- are doomed.

## 2

**Leaders are agnostic in their technology choices when it comes to handling paper-based and digital information.**

A mistake that many organizations make is to continue to adopt parallel workflows for paper-based and digital information. Capture leaders work to standardize processing of these disparate inputs into a single business system. In our survey, only 48% of organizations use the same system to process both e-forms and paper forms, indicating much work remains to be done in building this core competency.

As the volume, variety and velocity of information continues to rise, document-specific processes -- i.e., non-standard processes that vary from document type to document type -- are a recipe from unnecessary manual processes downstream -- processes that will confound and disrupt efforts to

digitally transform. 60% of organizations in our survey say that they process *a minimum* of ten different document types in any single system. In AIIM's broader Digital Transformation survey, 34% of organizations said they are planning to spend "more" or "a lot more" on multi-channel information capture in the next 18-24 months.

## 3

**Leaders "connect the dots" between document-based data quality and authenticity and their RPA initiatives.**

In the [AIIM Digital Transformation survey](#), 32% of organizations are planning to spend "more" or "a lot more" in the next 18-24 months on Robotic Process Automation (RPA). If these efforts are to have any chance of success, there is complementary need for organizations to improve their ability to extract the data that is lodged *within* documents.

RPA processes are usually more complex than the easy-to-define, highly-repeatable tasks often associated with traditional document capture. In these new environments, an RPA engine is both a *consumer* of document-based data in order to conduct its work -- increasing the premium for automated data quality and authenticity -- and an *exporter* of data into other systems.

In an article in *Data Center Journal*, Greg Council from Parascript describes this dichotomy:

*RPA platforms promise to bring major change across many industries... The RPA leaders have adopted a machine-learning approach to initial configuration that benefits from easier-to-use, more-flexible and adaptive rule sets in place of its more brittle rule-based AI cousin using expert systems.*



This tip sheet was sponsored by [Parascript](#). [Parascript](#) automates the extraction of

meaningful, contextual data from image and document-based information to support transactions, information governance, fraud prevention, and business processes.