Plan Your Move to Cloud Office Automation

How to start digitally transforming your organization with document management and workflow delivered as cloud services

Contents

The new paradigm of modern business

Cloud: it's a big deal. And it's here to stay.

According to Gartner, Inc., "more than $1 trillion in IT spending will be directly or indirectly affected by the shift to cloud during the next five years. This will make cloud computing one of the most disruptive forces of IT spending since the early days of the digital age." LINK

Growing businesses are discovering how subscription-based services such as SaaS (software as a service) level the competitive playing field by unlocking access to advanced technologies once too complex and expensive except for only the largest organizations.

Today, mission-critical applications like CRM, ERP, HCM, project management and document management are readily available via the cloud.

By shifting their IT infrastructure to cloud-based solutions, organizations can now transform their processes to what their business really needs.

The result is not just efficiency — it's daily productivity, employee efficiency, and operational agility. It's a whole new pace of business.

> " Line-of-business leaders everywhere are bypassing IT departments to get applications from the cloud (also known as software as a service, or SaaS) and paying for them like they would a magazine subscription. And when the service is no longer required, they can cancel that subscription with no equipment left unused in the corner."

Daryl Plummer

ANALYST

Gartner LINK

Why cloud matters to you. And your customers.

Why cloud matters to you. And your customers.

Part 1: The weight of on-premises

For decades, "on-premises" was once the primary way to acquire and deploy business technology. At a high level, this was the applications, storage and networking technology installed within the four walls of your business or data center. Physical assets like servers, routers and hard drives had to be purchased, installed and ultimately replaced. They required expensive, time-consuming maintenance, upgrades, integrations and security monitoring.

Despite commodities like storage, scale is difficult to achieve. And enterprise software, typically consumed by licenses, is expensive to buy, install and integrate.

Cloud solves many of these headaches.

> "Companies that don't use the cloud to drive this new value and innovation to the marketplace won't keep up with the market."

Frank Gens

SENIOR VICE PRESIDENT AND CHIEF ANALYST

IDC Group LINK

Part 2: The lightness of cloud

Cloud-based systems are a more intelligent and conscious means of driving your business.

Employee centricity

Cloud-based business operates on the "any-X" principal: your best work can happen anywhere, on any device, at any time. Employees are no longer bound by internal networks and distant data centers.

Cost structure

With cloud, the entire model of expense is flipped: lighter subscriptions to services can be categorized as operational expenses rather than capital expenditures. That why from a purely budgetary standpoint, cloud makes a whole lot of sense.

Scalability and operational flexibility

Cloud-based services are ideal for every shape business, whether growing and fluctuating demand or consistent high demand. Scalability is instantly adjusted through a convenient interface. The days of managing data centers are gone.

1

Why cloud matters to you. And your customers.

(Continued)

Simplified maintenance

Cloud service providers assume responsibility of system upgrades and security patches.

Life of business deployment

Cloud applications deploy quickly without lengthy IT processes. LOB managers can evaluate and acquire technology that best works for them.

Security

Cloud service providers can leverage economies of scale to provide security beyond anything you could practically do on your own. This frees IT from reactive patching, allowing them to focus on more strategic projects.

Part 3: New heights of customer experience

Cloud-based technologies — and how we use them at work and in our personal lives — continue to change the way companies do business worldwide. Consumers no longer just compare your offerings with those of your direct rivals; their experiences with companies like Apple or Amazon have reshaped their standards.

Cloud services now enable even the smallest competitor to deliver a game-changing experience via massively scalable storage and computational firepower to crunch the largest sets of data, to provide the analytics to understand it, and the security to lock it all down. Entire market segments have used cloud as the foundation of their customer experience: Uber, Airbnb, SnapChat, Spotify and many other billion-dollar businesses would not exist without cloud.

Your employees and customers now demand the same level of experience from your business.

Digital transformation and cloud office automation
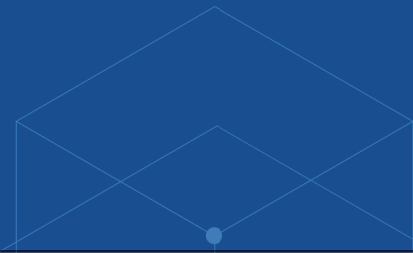
2

Digital transformation and cloud office automation

No modern business leader has escaped the media hype regarding the brave new world of digital transformation.

From manufacturing, to retail, healthcare, and government: every industry is aware of the benefits of digital transformation. Brian Solis, principal analyst at Altimeter Group provides one of the best definitions of what digital transformation means from a business perspective:

"

Digital Transformation is the realignment of, or new investment in, technology, business models, and processes to drive new value for customers and employees and more effectively compete in an ever-changing digital economy."

Brian Solis

PRINCIPAL ANALYST

Altimeter Group

Ignoring cloud?
Look forward to being left behind.

A CIO Insight survey revealed that although most IT leaders consider digital transformation a top priority, few have implemented the technology to shift into a fully digital business. Yet 86% considered cloud-based systems as crucial for digital transformation projects, and more than half are more confident about data security since moving to the cloud.
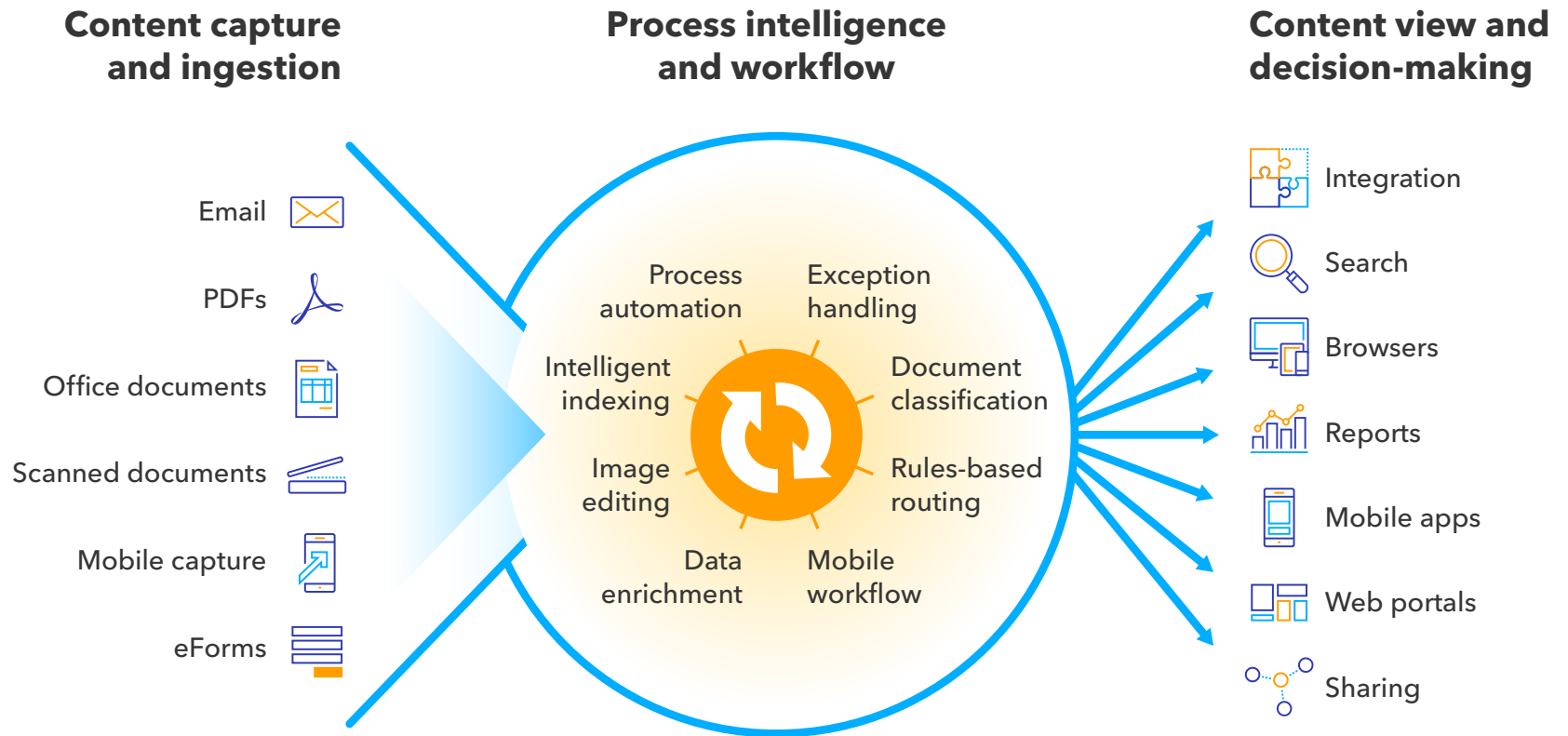
The results speak for themselves: digital transformation is the next big technological wave, and cloud technology continues to drive it forward.

Digital transformation and cloud office automation

(Continued)

Components of cloud office automation

Content capture and ingestion

Email

PDFs

Office documents

Scanned documents

Mobile capture

eForms

Process intelligence and workflow

Process automation

Exception handling

Intelligent indexing

Document classification

Image editing

Rules-based routing

Data enrichment

Mobile workflow

Content view and decision-making

Integration

Search

Browsers

Reports

Mobile apps

Web portals

Sharing

The components of cloud office automation. This combination of capabilities to set a new pace for business by improving worker effectiveness and operational performance. For managers looking to derive deeper, meaningful value from their teams of knowledge workers, the value is immediate and lasting.

Digital transformation and cloud office automation

(Continued)

Cloud office automation: at the heart of digital transformation

Office automation is integral to many cloud strategies. This combination of document capture, document management, workflow, archival and access functionality enables organizations to raise knowledge workers above manual, tedious, task-based jobs and into work that is productive, innovative and profitable.

Knowledge workers can:

✓ Stop wasting time on manual, repetitive tasks and push routine processes to the background, interacting with information only at key decision points.

✓ Focus on more innovative, project-based "deep work"

Managers can:

✓ Improve the speed, clarity and accuracy of decision making

✓ Eliminate manual shuffling and disorganized storage of documents

✓ Build automation workflows designed for specific business needs and adapt them on the fly to changing business requirements

IT leaders can:

✓ Increase capacity and add capabilities quickly without investing in new infrastructure, training new personnel, or licensing new software

✓ Use standards-based integration to ensure systems communicate with one another

Enterprise developers can:

✓ Build and extend corporate technology stacks with fewer integration challenges

✓ Leverage the power and flexibility of known and trusted infrastructure providers like Microsoft Azure

QUIZ

# Is cloud office automation a good fit for your organization?

(Of course it is. But take the quiz anyway.)

Although this exercise may seem somewhat rhetorical, answering these pragmatic questions will give you a better understanding of the core value of office automation.

1	Are your documents fully digitized, securely stored and easily accessible?	Yes	No
2	Are you confident that your systems can protect all your information – including your customers' information?	Yes	No
3	Is your staff spending most of its time on high-value, knowledge-driven work that will actually help your business?	Yes	No
4	Is your budget free from outdated, expensive on-premises software and its lengthy depreciation cycles?	Yes	No
5	Has your executive management team stopped demanding higher levels of performance without additional resources?	Yes	No
6	Have you achieved total information and process nirvana?	Yes	No

If you answered "No" to any of these questions, your business will probably benefit from adopting a cloud-based approach to office automation.

How and where to start in cloud office automation

3
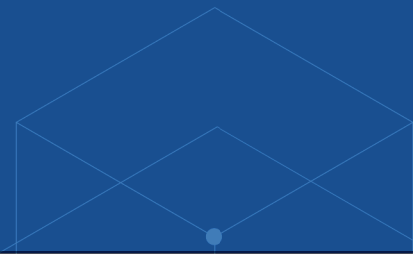
How and where to start in cloud office automation

As straightforward as A-B-C.

One of the primary values of cloud services is the "as you need it" model. Instead of purchasing large on-premises systems and implementing complex, cross-departmental models, cloud office automation scales, no matter how small or great your business demands. This inherent flexibility enables your teams to grow productivity at the pace of your business. Plus, you can start small and scale as your business requires.

Getting started in cloud office automation is as straightforward as A-B-C.

The goal: shift from tedious, manual, inefficient task mitigation to seamless, productive workflow.

A. Start with the right workflow

Cloud office automation works best in document-centric business workflows where time spent by knowledge workers needs to shift from tedious, manual tasks to more strategic "deep work" that provides meaningful value to your organization.

These workflows are often found in the business office of an organization. Departments like human resources, accounting, legal, procurement and others use repeatable processes that break down into steps, assignments and decisions.

At the heart of these processes are documents, such as employee performance reviews, invoices from suppliers, contracts and agreements, and many more.

Common processes that yield outstanding results in automation include invoice processing, employee onboarding, and contract management. These are typically excellent workflows to tackle first, as they offer substantial productivity gains from automation.

3

How and where to start in cloud office automation

(Continued)

B. Identify the integration points

Office automation technology rarely operates in isolation. In fact, integration with complementary software is core to its value proposition. At the end of the day, the goal is to unite people, processes and technology to increase the overall pace and effectiveness of your knowledge workers.

Once you've established a business workflow starting point, you need to determine the critical applications that enable your team to thrive. Below are some examples.

ERP

Invoice approval

Integration with an accounting or ERP system is mandatory to ensure the flow of documents aligns with your financial records. This might be Quickbooks for a smaller business, or Microsoft Dynamics for a larger organization.

HCM

Employee onboarding

Human resources teams often use an HCM app like PeopleSoft to manage employee information, and use office automation to ensure that documents in that app are captured, routed, signed, completed, approved and stored with appropriate privacy settings.

Office

Contract management

The most important integration might be the tool that legal and procurement teams live by: Microsoft Word. Tying Word documents into structured workflow while supporting strong security and version control is critical to the success of contract management teams.

3

How and where to start in cloud office automation

(Continued)

C. Evaluate the vendor

As your organization embarks on its digital transformation journey to improve operating models and drive a premium customer experience, you will need to select key technology partners that provide "best-fit" cloud services.

Although technology partners can bridge skill and technology gaps, not all partners bring the same experience, expertise and capabilities to the table. When you evaluate potential vendors for cloud office automation, ask the following questions:

? Is the cloud offering complete, or only an undeveloped disappointment?

The technology market is flooded with large and small ECM (Enterprise Content Management) vendors that have built their on-premises products on IT architectures from the last decade. Today, many claim to provide cloud services, but only offer a highly restricted feature-set. This is not cloud office automation software. Look for partners that provide a complete set of document management and workflow capabilities through the cloud, including distributed capture, configurable workflow, secure archive, and robust access and viewing.

? Is the product usable out of the gate, or does its UI require a PhD to understand?

Cloud office automation is only as effective as the workers who use it. The user experience must balance high usability with high utility, providing a path to everyday productivity — not constant frustration. Complex interfaces, lagging performance and confusing functionality are the surest ways to stonewall adoption and waste your investment.

3

How and where to start in cloud office automation

(Continued)

? Is the underlying infrastructure a global backbone or a local liability?

Cloud services must be globally available, rapidly scalable, redundant, and fast. Look for products built on leading cloud infrastructures like Microsoft Azure, Amazon Web Services, or Oracle Cloud Infrastructure. Cloud services delivered through localized data centers or managed services will simply never deliver the performance and reliability of those leveraging a premium platform.

? Is security and data privacy a priority or swept under the rug?

Cloud office automation demands high security to meet data privacy and information compliance mandates. This is never negotiable. Technology providers without data separation, encryption and logging put your entire organization at risk — not to mention your relationship with your customers.

? Is integration possible through industry standards or expensive, propriety methods?

Interoperability matters. Cloud office automation is only as good as the people, processes and systems it unites. Integration should be possible through REST-based APIs. Cloud services should be able to communicate effortlessly with other cloud services and with on-premises software if needed. Proprietary methods that require significant professional services are a red flag.

? Is there a proven track record of success or only empty claims?

Look for cloud service providers with a proven track record of success. This matters more than most people think. Building robust cloud services is hard — much harder than on-premises software. A partner must be able to deliver what they promise through the cloud, with years of customer success as evidence of their capabilities and competence.

Cloud office automation success stories
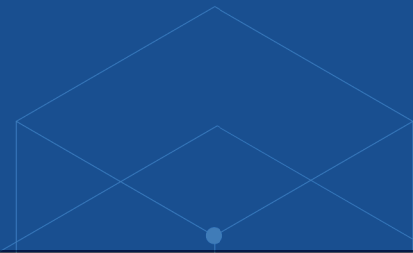
Case Study:
Onboarding Employees in Human Resources

LGC Hospitality onboard employees quickly and easily with cloud document management

LGC Hospitality, a leading staffing company with over 26 offices across the USA, fills temporary and full-time hospitality, hotel and restaurant positions for clients nationwide.

LGC processes paperwork for over 50,000 applicants a year and issues W2 forms for over 24,000 employees. Their time-consuming, paper-based employee onboarding process needed an overhaul. They selected DocuWare Cloud to digitize and streamline their onboarding workflow, simplifying the process for both applicants and staff.

By implementing the DocuWare Cloud solution, LGC can now:

✓ Digitize and streamline their onboarding process

✓ Create a searchable database of employees

✓ Provide the corporate office with immediate, electronic access to all records, regardless of location

✓ Improve response time to audit document requests

✓ Automate workflows and improve efficiency

✓ Offer a digital onboarding solution that is mobile-ready

4

Case Study:
Manufacturing Workflow

How DocuWare Cloud helps Rawlings Sporting Goods score big with vendors worldwide

Since 1887, St.-Louis-based Rawlings Sporting Goods Company, Inc., has manufactured and marketed innovative, high-grade sporting goods for the U.S. market. Known for their quality baseball equipment, the company also makes softballs, footballs and basketballs, and operates a robust custom uniform business. Rawlings sells direct to end-consumers through retail stores, schools, leagues and booster organizations.

Rawlings found their ERP data could be integrated well with DocuWare Cloud, helping them manage important information in one system, and provide a consistent, reliable way to communicate order information with vendors worldwide.

Since implementing DocuWare Cloud, Rawlings has realized these additional business benefits:

✓ Improved quality, accuracy and timeliness of each custom order

✓ Achieved faster production through business process automation

✓ Enhanced customer interactions, customer service and vendor relations

✓ Sped up business production and improved customer satisfaction

> "The relationship with our vendors has improved because we now have a consistent and reliable way to communicate order information. We've found that better vendor relationships support better customer service."

Sally Vandegrift Yeast

VICE PRESIDENT, CUSTOMER EXPERIENCE & ANALYTICS

Set the new pace for business with DocuWare

We hope you found this ebook helpful. Digital transformation and the swath of cloud technology it brings with it is a multi-dimensional topic many organizations spend years working through.

Cloud office automation will not solve every business problem, but it remains crucial in solving many of the day-to-day workflow and document management challenges that modern organizations face.

As you look to the future, reach out to us. DocuWare can help:

✓ Support the development and/or implementation of a cloud strategy for your organization, department or project

✓ Facilitate a workshop to demonstrate how office automation can impact the detailed nuance of your business processes

✓ Provide best-fit cloud services that match the budget, timeline, integration points and process demands of your particular situation

Discover how businesses throughout the world are using DocuWare cloud solutions to power their digital document management initiatives, increase efficiency and reduce costs.

Interested in seeing how DocuWare can set a new pace for business in your organization?

REQUEST A DEMO TODAY

DocuWare Europe GmbH

Therese-Giehse-Platz 2
82110 Germering
Germany

TEL: +49 89 894433-0
FAX: +49 89 8419966

SALES
infoline@docuware.com

SUPPORT
support.emea@docuware.com

DocuWare Corporation

4 Crotty Lane, Suite 200
New Windsor, NY 12553
United States

TEL: +1 (845) 563-9045
TOLL-FREE: +1 (888) 565-5907

SALES
dwsales@docuware.com

SUPPORT
support.americas@docuware.com

About DocuWare

DocuWare office automation solutions deliver smart digital workflow and document control that set a new pace for worker productivity and business performance. DocuWare's zero-compromise cloud services are a recognized best-fit for digitizing, automating and transforming key processes. DocuWare operates in 70 countries with headquarters in Germany and the U.S.