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Modernizing your enterprise forms and processes:
from paper to digital

GUIDEBOOK

Contents

Introduction

It may go without saying that digital transformation has impacted nearly every business ranging from small retail establishments to global technology powerhouses. Your clients, partners, and stakeholders are no longer satisfied with the status quo - they expect a fundamental evolution in how they interact with your business. Companies that don't respond with appropriate digital experiences can see their market share quickly erode to nimbler, more responsive competition. It doesn't stop there. These evolved, externally facing, processes impact back office ways of conducting business and have the potential to completely upend every facet of your organization.

Sounds pretty daunting, doesn't it?

Let's face it, most businesses out there may have aspirations of reaching that digital nirvana, but are a bit lost as to how to get there. Many of these same businesses have been built on technologies that are at least a decade old and often reliant on traditional paper-based forms and processes. Moving from a paper-powered business to one that is adept at navigating this rapidly changing environment in which we all live may seem like a massive undertaking, but it can be done.

Leveraging the right processes, tools, and best practices, even the most traditional workplace can thrive. In this guidebook, we'll briefly review the many challenges associated with running a business heavily reliant on paper, uncover the benefits of shifting to more modern and efficient technologies, and finally explore a framework designed to help you successfully migrate.

Problems with paper-based forms and processes

First, let's start by quickly looking at some common challenges with running a business powered by paper. While this may seem like an exercise of pointing out the obvious, you may be surprised at just how the status quo is negatively impacting your business.

The challenge
Useful information is locked in paper format

The impact
Management teams are unable to understand how the business is running.

Which results in
Lost opportunities using the data and difficulty taking advantage of market opportunities and quickly addressing issues.

A deeper look
You can't stay competitive in this landscape, whereby you're always playing catching up to those who are digitally transformed.

The challenge
Paper can be easily lost or damaged

The impact
Customer orders are not fulfilled or vendor invoices are not paid on time.

Which results in
Lost revenue, unclaimed early payoff discounts and wasted administrative work.

A deeper look
The typical misfiled document can cost $125 and a lost one can cost upwards of $700[1].

The challenge
Sensitive information is not secure

The impact
High likelihood of data leakage, jeopardizing company trade secrets and customer private information.

Which results in
Potential legal, financial and compliance concerns.

A deeper look
Europe's GDPR requires privacy of data which impacts how information is produced, handled and discarded of. Penalties are notoriously stiff.

[1] Source: https://info.aiim.org/now-is-the-time-to-break-free-of-paper

Problems with paper-based forms and processes

The challenge
**Information entered
can be missing crucial
information or illegible**

The impact
Substantial time dedicated to
deciphering or securing required
information.

Which results in
Costly administrative operations,
lost opportunities and slower
time to realizing results.

A deeper look
This ultimately means, as
an organization, you have
less time to focus on more
strategic endeavors.

The challenge
**The excessive time it takes
to process paperwork**

The impact
Decision makers can't make timely
decisions due to delayed data fueling
their reporting.

Which results in
The inability to make strategic
decisions or respond to changes in
the marketplace.

A deeper look
Time is money in business. The time
spent processing a single document
multiplied by the number of
documents can be staggering.

The challenge
**Processing paperwork
is expensive**

The impact
Limited resources are diverted to
driving inefficient processes and not
in driving the business forward.

Which results in
Higher cost structure and lack of
capital to invest in projects with ROI.

A deeper look
The cost to process a paper
invoice is roughly $30 compared
to fully-automated ones which
cost $3.50[2].

[2] *Source: https://www.industryweek.com/blog/cost-paper-based-invoicing*

Digital opportunities

Now that we've looked at the challenges facing business who rely on paper-based systems, let's shift focus over to some of the many opportunities unlocked when your organization embraces digital transformation. While everyone is unique in how it conducts their business, there are some fundamental benefits that would be of use to all.

The opportunity
Eliminate manual errors

How it can be done
Modern digital forms can eliminate common manual errors through field input validation, auto calculations, required fields and the removal of often illegible data entry.

Why it's important
Increases the accuracy of data that will be used by multiple systems and processes. Drives far more accurate reporting to inform strategic decision making.

The opportunity
Rapid accessibility of data

How it can be done
Data collected through digital forms can be quickly surfaced to any number of business systems and processes.

Why it's important
Data can be acted upon instantly across the organization. The result can be faster order executions, customer service engagements, and decision making.

The opportunity
Cost savings

How it can be done
The removal of unnecessary process steps and their associated resources.

Why it's important
The investment can be redirected towards other areas of the business with better ROI.

The opportunity
Document control

How it can be done
Rules-based routing can ensure that the right stakeholders are engaged and that the required steps are completed in agreed upon timeframes.

Why it's important
Processes drive compliance and can provide support for audit preparation. Additionally, intelligent document versioning can ensure that only the most recent material is available.

The opportunity
Increased security

How it can be done
Properly architected digital forms and processes can ensure that only those with a need-to-know have access to sensitive data.

Why it's important
Data security is a top priority for all businesses. Intelligently limiting access ensures that sensitive data remains in the hands of only those who need it, reducing compliance issues.

The opportunity
Visibility

How it can be done
Data collected digitally can be resurfaced through reporting tools as soon as it's made available.

Why it's important
The ability to make impactful business decisions relies heavily on the ability for decision-makers to access the most timely and accurate information.

Taking advantage of the many opportunities made available by transitioning to digital forms and processes is crucial to compete in today's winner-take-all business environment. Even with a full understanding of the downsides of the status quo and the sheer amount of potential behind transitioning to digital, often knowing how to proceed is a major obstacle to many organizations. Next, we'll explore best practices in such a transition.
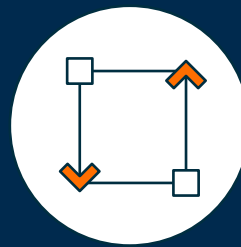
Best practices-based framework for modernizing forms and processes

MAP YOUR PROCESSES

INFORMATION CAPTURE

PROCESS AUTOMATION

CONNECTING AND MANAGING DATA

REPORTING AND OPTIMIZATION

Map Your Processes

The first stage in any digitalization project is to survey the landscape of what's currently out there with the goal of getting answers to questions such as:

- What processes are out there?

- Who are stakeholders in each of these processes?

- What technologies (or lack thereof) are leveraged?

- Who interacts with these processes? Customers? Partners? Vendors?

By thoroughly understanding what's currently in place, you can identify areas for streamlining and possibly automation. Though documenting potentially hundreds, if not thousands, of business processes sounds challenging, remember that we are in the age where technology itself can help you scale. Look for a process mapping solution which lets you empower the people who are actually living and breathing these processes to document them for you.

Collaboration is key here. You have process owners who no doubt know how things are done, but there are also ancillary stakeholders and process participants who may have insight into how those processes can be improved. Tap into this collective thinking to quickly evolve what is being done to new levels of productivity and efficiency. Look beyond simply emails or hallway conversations to enable this as those communications vehicles lack scale, visibility, and documentation.

No longer do you, and your team, need to drown in countless needs assessment exercises only to see the processes change just a short time later.

By focusing on scale and collaboration, you can:

- Increase participation by the people who know the processes the best

- Drive visibility into what's currently being used (or not used) through online documentation

- Encourage stakeholders to suggest improvements to processes

- Uncover what resources or systems are commonly being accessed

- Identify what processes would benefit the most from automation

Once you have an understanding of what the process landscape looks like, it's time to move onto step 2.

Information Capture

"Capture" refers to how information is gathered and introduced into a process or system. In many cases, this first point of contact for customers, partners and stakeholders can be a simple paper form. As we noted earlier in this guidebook, there are numerous issues with this type of situation. The form may be illegible, can be easily lost or misfiled, destroyed or even simply be missing critical pieces of information. It's time to eliminate all of these concerns by using modern information capture, which most often centers on electronic forms.

Though it may be tempting to simply leverage simple forms, spreadsheets or even PDFs, it's best to start off on the right foot with powerful digital forms. If you're going to introduce a new means of submission, it had better be one that will effectively grow with your digitalization efforts. Simply starting with a solution that is "good for now" will limit you as adoption increases and could jeopardize future efforts.

Now, the best way to approach migrating to electronic forms is to focus in on what data you are trying to capture and not on how it was necessarily collected in the past. Just because the previous paper form had 35 questions doesn't mean that the new digital version has to have anywhere near as many. Imagine how quickly the new form could be completed by employing the right logic whereby only select form fields are shown based on what was entered by the form submitter. Not only will you drive higher form completion rates, you'll also increase the likelihood that fields are properly entered.

Next, tackle incomplete or erroneously entered information using automated field calculations and field validation. The business systems that this information will feed into will get better, more accurate data points which will then produce better reporting. Speaking of data, by shifting away from paper-based forms to digital forms, you will have the ability to unlock an additional set of data points around the forms themselves.

Lastly, anticipate where forms will originate from? In the paper world, they probably arrive in the mail or perhaps fax or even by courier. In the new digitalized workplace, it can be done via a PC, tablet, or even a smartphone. Make sure that the solution you choose lets you create responsive forms that span across any of these devices.

Now all of this new data, which has far fewer errors, can be made useful in step 3.

While forms may be a great way to capture data, there will inevitably be instances whereby you need to extract data from existing paper documents. This can take the form of a one-off paper submission or perhaps archived paperwork that you would prefer be digitized for reporting purposes. OCR (optical character recognition) software can be leveraged to capture data from paper documents in-house, through the use of scanning hardware found within multi-function printer/copier devices, or outsourced (when scale and speed are crucial) through third-party vendors.
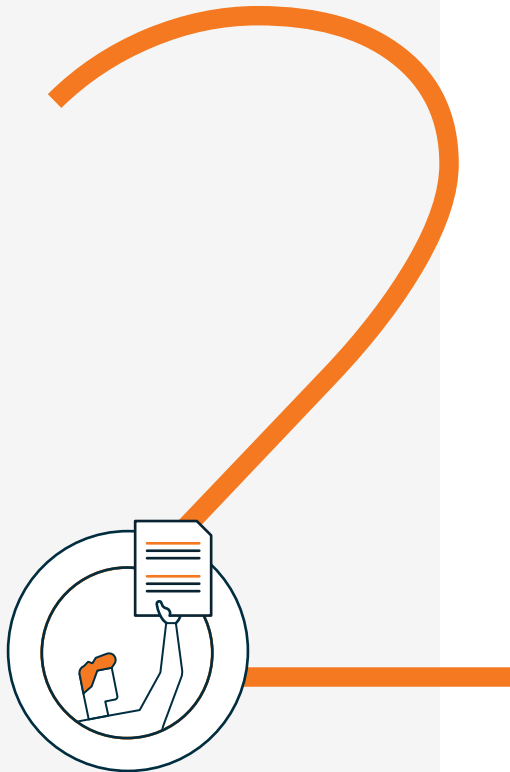
Process Automation

The days of complex coded process automation are largely a thing of the past. With modern no or low-code solutions widely available, it doesn't take a seasoned software developer to create enterprise-grade digital forms and workflows. This enables you to dedicate more existing resources, such as analysts or IT generalists, to digitalization projects instead of far more expensive programmers who can focus on more niche projects.

With the understanding of what processes are actively being used, uncovered in step 1, you now have a far deeper and more expansive view into where to start with your automation efforts. While determining which processes to start with largely depends on the unique needs of your business, there are a number of paper-based processes that are typically addressed initially due to the sheer volume of printed content[3]:

- Accounts payable

- Accounts receivable

- Records management

- Contract management

- HR onboarding and applicant tracking

Now it's time to leverage all of that untapped data gathered in the capture phase. Unlike paper-based forms which hold information hostage, digital forms immediately collect the information and make it ready to be used elsewhere in the process. It's the process automation step that effectively acts as the "glue" or orchestration layer between business systems, complete with business logic, to actually do something with it.

It's critical here to choose a solution which not only makes it easy to create workflows but also to change them when the need arises. Remember that as your business scales not only in the adoption of digital technologies but in overall size, you will be tasked with not only creating new automated workflows but also maintaining existing ones. As a result of using automated workflows, you may see value in iterating what you've built based on newly generated telemetry.

Though it may be incredibly tempting to simply convert the steps found in manual processes into the digital world, it's best to rethink how your processes can be done. Digitalizing processes presents an amazing opportunity to fundamentally reinvent them. A few questions to ask yourself as you architect new workflows:

- How can the data that was initially captured be leveraged in new ways?

- Without the necessity for time-consuming manual steps, how could your workflow be more efficient?

- Are there opportunities to make it easier for those interacting with the workflow? Perhaps via mobile devices or even messaging services like Slack or Microsoft Teams?

Now an automated workflow, in itself, is quite limited if it's not connected to sources of data. That brings us to step 4.

Connecting and Managing Data

The average enterprise can rely on numerous business systems and recent data shows that they use 16 SaaS (Software-as-a-Service) applications on average today, up 33% from the year prior. Not surprisingly, 73% of organizations foresee running almost all (80%) of their applications as SaaS by 2020[4]. Complicating this scenario is the inclusion of legacy applications, particularly within highly regulated industries like healthcare and financial services.

No matter how much data you've amassed in your systems of record, digital forms and mobile applications, if they don't connect with one another, their value is severely limited. Automated workflows should become the bridge between these applications and empower you to extract far more value from the data contained within them.

This is where digital solutions really shine compared to their analog, paper-based counterparts. Selecting an automated workflow solution which connects to the business systems that run your business is key. Additionally, consider if the solution can quickly adapt as your business adopts newer technology to fuel its digitalization efforts. A few years from now your IT architecture landscape might look entirely different than what it does now. Expect that change will undoubtedly happen and plan for it.

Apart from the data connections, consider where newly generated documents and files will reside in your new environment. One amazing capability of modern automated workflow platforms is the ability to create data-driven documents based on workflow logic. Whether these take the form of custom slide decks, vendor agreements or even e-signed contracts, they can quickly pile up. Plan ahead and strategize how you want to archive these files. Perhaps in existing systems of record, on-premise storage (due to data residency restrictions) or in an ECM (electronic content management) system like SharePoint or Box.

Now that you have your processes mapped, your information capture in place and automated workflows humming along with connections to your business systems, it's time to track progress and optimize things, as highlighted in step 5.

[4] *Source: https://www.bettercloud.com/monitor/wp-content/uploads/sites/3/2017/05/2017stateofthesaaspoweredworkplace-report-1.pdf*

Reporting and Optimization

Reporting in the paper-based world is quite challenging. What is generated often lacks granular detail and is more often than not reporting on what happened weeks if not months ago. In today's fast-moving business environment, reporting in as close to real-time as possible is not a "like to have" but a "must have".

Paper forms have to be gathered, assuming they are all accounted for, transported to a data entry or scanning facility, digitized and the resulting data is (hopefully) made available to reporting systems. This is an expensive, time consuming and error prone process in itself. Each manual step along the way is an opportunity for failure.

Reporting with digital forms and automated processes means you get an accurate picture of what's happening now and equips you and your team to quickly act upon it. Whether it's a bottleneck which required remediation or a hidden opportunity that needs to be acted upon, time is of the essence. On top of this, the more data you can gather, the better. Whatever paper forms and process replacement you look at should at least provide you visibility into how individual processes are behaving. This is commonly referred to as "process intelligence".

Process intelligence can inform you as to:

- Individual workflow performance
- Data-driven trending
- Potential areas for optimization

Remember, optimization is a journey, not a destination. With that in mind, ensure that you are comfortable with the ease-of-use for provided reporting tools and get the level of detail that will best equip you to refine your processes.

The elephant in the room: change management

75%
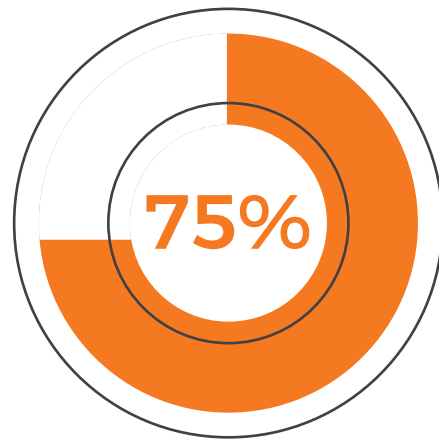
Even with the right budget, the best staff, and most advanced toolset - there will be resistance to change. In fact, AIIM found that **75% of survey respondents perceived change management as a major roadblock in their struggle to shift to a paper-free office[5].**

In light of this, creating, and following through, with a comprehensive change management plan is vital for success. Outside of a few select scenarios, people are creatures of habit and naturally will resist changes to what they see as the status quo.

While there are numerous frameworks to create such a plan, there are a few fundamental best practices that should be included.

[5] Source: https://info.aiim.org/work-made-better-4-critical-elements-of-intelligent-capture-and-workflow

Fundamental best-practices

Take a staggered approach

As with any major project, you want to start small and build on success. Focusing on particular departments or even individual sets of processes can be beneficial in several ways:

- Affords you the ability to fine-tune your tools and processes as you begin

- Ensures that early feedback, often some of the most impactful, can be worked back into the deployment

- Enables you to build early champions

Identify early adopters and create champions

In situations where you introduce new technologies or processes, often you find eager early adopters. Those who are genuinely excited about trying something new and are more than willing to add their names to the adoption list. These can be valuable allies in gaining early traction in the change process.

Often during a wave of change, you can identify individuals who eventually see through the difficulty of change and spot the opportunity on the other side. They can be powerful voices in convincing other teams and employees to adapt to the change. Be sure to listen carefully to their input and ensure that they are equipped with whatever is necessary to magnify your change message.

Fundamental best-practices

Leverage executive sponsorship

As with any major project, it's essential to secure the support and sponsorship of key members of the executive leadership team. With their ability to align your paper to digital transition to the strategic direction of the organization, employees will be far more incented to follow your lead. This is a powerful complement to the efforts of early adopters and champions who provide their supportive voice at a lateral level.

Provide plenty of visibility to the transition timeline

Sudden changes are never pleasant and often are met with immediate opposition. To avoid this pitfall, provide a set timeline to impacted employees as to when the current manual processes will no longer be valid. During this time, it's important to encourage them to try the new processes to build confidence in the transition. Partner this with thorough training, ready access to individuals who can answer their questions (whether they are in IT or even a champion) to remove much of the perceived risk.

Transitioning from paper to digital
Real world examples

You may be reading this thinking that it still seems like an intimidating undertaking, but rest assured that many others have been in your shoes and have successfully done this. Here are some real-world results realized by enterprises around the world after digitalizing their paper-based forms and processes.

Hawkes Bay Regional Council
Government

Challenge
Hawkes Bay Regional Council needed to ensure that water testing results were easily gathered and accurately entered into systems for decision making, and do so as efficiently and quickly as possible.

After going digital
Over a five-month testing period,
the new system saved the council 200-300 hours of work.

Lippuner
Energy Services

Challenge
Lippuner sought to update its slow, paper-based processes for ordering supplies. These outdated systems wasted employees' time and cost the company substantial money.

After going digital

- Realized $250k in savings to-date
- 50% faster fulfillment
- 67% less time to process orders

DMS Health Technologies
Healthcare

Challenge
DMS needed an easy-to-use workflow solution that would securely automate paper-based processes, save time and eliminate data input errors.

After going digital

- Capital expenditure approvals are now ~85% faster
- Orders are 90% more accurate
- Asset management processes are 50% faster

Ferring Pharmaceuticals
Healthcare

Challenge
Ferring employees were struggling with the company's slow-moving paper-based travel approval process that often caused delays and unnecessary stress.

After going digital
85% faster approvals

Abu Dhabi Department of Transport
Government

Challenge
The Abu Dhabi DoT wanted to improve productivity and efficiency by replacing manual processes reliant on an aging intranet portal, emails and paper documents.

After going digital

- 80% efficiency gain with a single digital workflow
- >40% reduction in processing time

Insurance Fraud Bureau of Massachusetts
Government

Challenge
The Insurance Fraud Bureau of Massachusetts' investigative process involved printing boxes of documents and a manual review process for every case, challenging staff time and storage capacity.

After going digital

- New process saves a week of time dedicated to each investigation
- 80% reduction in the time needed for document handling
- $5k annual savings in print and copying costs

Adventist Health Systems
Healthcare

Challenge
With multiple facilities and staff changes, their verbal and email ordering system required time-consuming back and forth emails to confirm details for new equipment and business card requests.

After going digital

- Errors were reduced by 50%
- Each order took IT staff 2 hours less to complete across 700 orders annually

ANZ Bank
Financial Services

Challenge
ANZ Bank wanted to replace its manual processes for retail and institutional operations with a scalable, standardized solution that provided workflow transparency, electronic collaboration, and document storage.

After going digital

- 30% more loans processed per month
- Zero duplicate data entry
- 15% increase in employee productivity

Muntajet
Sales and Marketing Services

Challenge
Frustrated with manual approvals and a challenging SAP interface, Muntajet sought to streamline and eliminate paper-based and partially digitized processes.

After going digital

- 200% increase in accuracy
- 100% ROI in less than two years

Grupa LOTOS
Energy

Challenge
Oil and gas company Grupa LOTOS needed a fast, efficient and user-friendly way to manage brand assets, keep them updated and distribute them quickly to internal and external customers in a broad range of situations.

After going digital

- 30% time savings through digital asset management
- $20k in annual print cost savings
- 50% less time spent by employees managing brand communications

Mitchell & Butler's
Restaurants and Retail

Challenge
Mitchell & Butler's retail business managers spent between 30-60 hours every three months reviewing safety paperwork for each restaurant. They needed a way to free up their time while improving safety assurance.

After going digital

- 23k hours saved annually in paperwork review
- 3M pieces of paper now no longer need to be manually reviewed

Summary

Paper-based forms and processes have been the backbone of business commerce for hundreds, if not thousands of years. Modern technology, such as process management solutions, digital forms, mobile applications, and low-code process automation have matured significantly over the past decade to provide an incredibly compelling, efficient and cost-effective replacement for these more manual ways of conducting business.

Digital transformation has become a powerful forcing function for businesses large and small to fundamentally adapt to the new ways that customers, partners, vendors, and stakeholders demand to interact and conduct business. Ignoring this wave of change could very well have dire consequences in light of competitors who are eager to embrace it with open arms.

In searching for the right solution to your transition from paper-based forms and processes, it's imperative to find one that best fits how you want your business to run in the future - not simply meet its current needs. Make sure that it enables you to map current processes collaboratively with process owners, provides responsive digital forms, provides a low-code means to quickly create process automation, and arms you with process intelligence to help you to best optimize your processes.

Implementing such a change is no easy feat but through the use of a well-thought-out change management plan that focuses on starting small and building on success, empowered champions, executive sponsorship and providing plenty of time for employees to adapt to the new way of conducting business, your chances for success are dramatically increased.
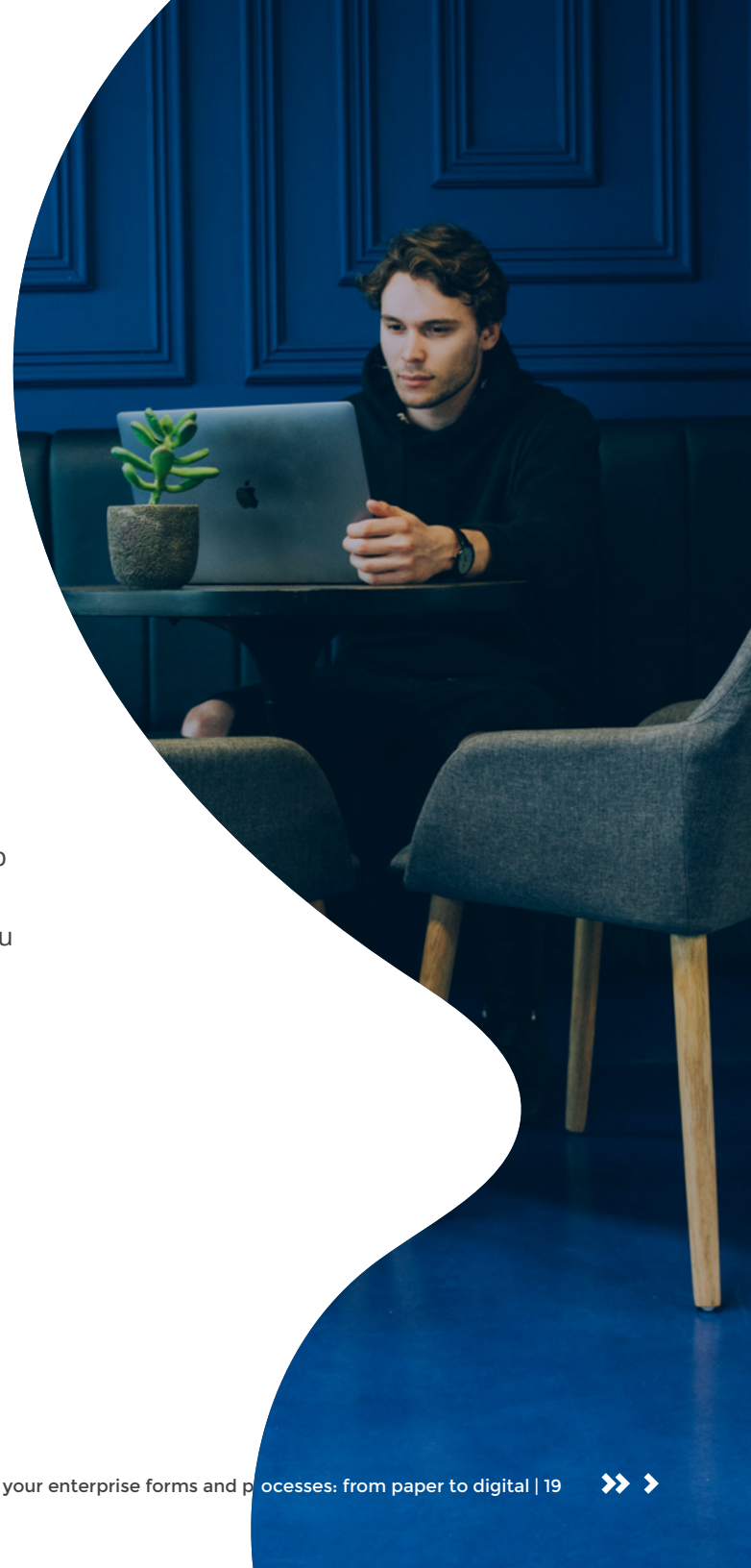
About Nintex

Nintex, the trusted global standard for process management and automation, enables both IT and BDMs to more quickly and easily create and manage simple to sophisticated business processes from back to front-office. More than 8,000 customers in 90 countries turn to Nintex's workflow automation platform to drive productivity and accelerate business results. We have the fastest way to build applications, lowest total cost of ownership, and the highest overall satisfaction among our peers.

In 2018, Microsoft awarded Nintex Workflow for Office 365 with Best Overall App and Nintex Forms for Office 365 with Most Business Value. Nintex also won Microsoft Office and SharePoint Application Partner of the Year award.

We welcome the opportunity to discuss your business needs and demonstrate our unique approach to workflow automation. We are happy to offer the following services:

- A business requirements discussion with one of our workflow experts and our partners
- Solution demos and proof of concepts tailored to your requirements
- A comprehensive response to your RFI/RFP
- Customer testimonials

Learn more at **www.nintex.com**

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