Selecting a Capture Solution Provider

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When you've made the decision to invest and optimize your in-house scanning and capture operation navigating the capture solutions currently available can be a difficult, if not daunting, task for your organization. If your organization has numerous manual-based document processing workflows, choosing a capture solution and the ROI associated will be straightforward. A quick web search will provide dozens of self-proclaimed "technology" providers. What is the best way to get started on the journey towards better management of your remaining paper based processes?

The most important consideration should be to understand the current workflows before selecting any hardware or software technology. A common mistake in the pursuit of a new solution is selecting technology and then trying to fit your workflow to the technology. Another is applying new technology to old, manual processes. This is a good time to take the opportunity to reengineer your processes to optimize your desired outcomes for speed and cost reductions. Adapting the technology to the best work processes for your organization will promote acceptance and drive compliance to the new digital solution.

IMPORTANT FUNDAMENTALS OF THE JOURNEY

1. **Discover your document world(s)** – Assuming your decision will incorporate the inbound documents of the entire enterprise, an important first step is determining the types of documents that you want to capture, the current manual workflows for the documents and the required archival requirements. Is your team manually keying information into an accounting system for AP processing? Are you performing desktop scanning for contracts and storing PDFs on a shared drive?

   Take the time to gather this information up front and identify the gaps between the manual process and the opportunity for automation. Be prepared for pushback! Replacing inefficient manual processes with automation makes economic sense and allows organizations to provide a better customer experience, but it can cause concern by those that are accustomed to their current workflows.

   In addition to the inbound documents, consider the documents stored in file cabinets, closets and within costly storage facilities. Documents that are currently being stored physically can leave your organization vulnerable to audits and out of compliance with your organization's record retention policies. A coordinated back file conversion can reduce the costs of physical storage and provide optimization of your scanning operations, by providing work to fill the hours when inbound document processing is low. More importantly, the documents will be stored securely for their retention life cycles, resulting in reduced risk for your organization.

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Finally, keep an eye on the future of the document images and the pertinent data needed from them. Determine the index fields that are pertinent for each different document type to ensure that the data will interface with other business processes and archival searches.

2. **Centralized scanning versus a distributed approach** – This is a key decision point for determining the best capture solution for your organization. If all documents are routed to a centralized scanning location, a focus on the solution's ability to process multiple batches simultaneously will increase throughput and provide failover options. A centralized approach may impact your hardware selection due to the need for reliable document handling and image quality on high-speed scanning equipment to meet the demand.

   A distributed solution will require compatibility with multi-functional devices and a user interface for ad-hoc document indexing from remote locations. The type, location and usage rates of scanning devices used in various locations will impact maintenance and usage fees within the solution. A distributed approach should include secure transfer methodologies and will require a commitment from IT resources to maintain secure connectivity and equipment maintenance.

3. **Evaluating the solutions providers** – Consider providers that have application expertise with the specific documents utilized by your organization. The solution should have the standard capabilities for easy document classification, OCR/ICR data capture with high acceptance rates, quality and exception processing controls, scalability and transparency of end-to-end document processing – from scan station to archive/destruction. Require that the solution providers demonstrate capabilities with your most common applications and your most problematic or complex applications. How will they solve the problems that you are experiencing now?

   Today's solution providers continue to advance their capabilities with document classifications and OCR readability. Be realistic about your documents and how they are constructed. Are they standardized containing structured data, or do you process high volumes of unstructured documents that may even include hand written notes. This will impact your OCR acceptance rates, particularly in accounts payable processing and require the solution to have clean exception handling.

4. **Optimization** – There are a number of other considerations based on your organization's readiness for a new solution that will optimize your process. Best practices are to integrate the capture solution into your business workflows and perhaps your own ERP systems which will require a commitment from IT for integration of the solutions. A loosely coupled capture platform will provide the flexibility to interface with other workflows, archival systems and even the use of Robotic Process Automation as these technologies

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emerge. Multi-channel import options, including mobile, (even if you're not ready for it) may not be part of the standard solution, but they should be available as an add-on to your solution.

SUMMARY

Optimizing an in-house scanning operation with new technologies can be achieved by developing a clear strategy that outlines the current and desired state of document workflows within an organization. Identifying the resources from within the organization and gaining the institutional knowledge of the subject matter experts will drive success by identifying the problem areas where automation and technology can be utilized to improve document processes. Once the background data has been captured, the information will assist in driving to a successful technology solution.

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ABOUT MADISON ADVISORS

Madison Advisors exists to advance the print and electronic communications objectives of Fortune 1000 companies. Madison Advisors specializes in offering context-specific guidance for a range of content delivery strategies, particularly those addressing enterprise output technologies and customer communications.

Madison Advisors offers services and expertise primarily through short-term, high-impact consulting services. With no-nonsense, quick engagements (measurable in days or weeks, not months), Madison Advisors directly helps our clients achieve very hard and specific return on investment (ROI) related to their print and electronic communications initiatives.

Madison Advisors' analysts are dedicated to technology and market research that is delivered through shortterm project engagements as well as articles, publications, and presentations. We specialize in customer communication technologies including enterprise output management, content management, customer relationship management, e-billing, and infrastructure technology.

For more information on selecting a capture service provider, contact Madison Advisors at info@madison-advisors.com or call 817.684.7545.

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Susan brings over 20 years of experience in consulting in the business communications and business process outsourcing industries to Madison Advisors. With an extensive knowledge of strategic account and data management, Susan is well-versed in customizing solutions for business process re-engineering and the outsourcing of business-critical back office functions using technology to achieve automation. As part of Madison Advisors, Susan has served as a program manager for a large-scale print and mail outsourcing project, coordinating multiple phases of execution and managing the associated risks with both the client and the end customer.

Prior to Madison Advisors, Susan worked as a Client Solutions Executive for EDM Americas for six years, where she oversaw new business development and project management within existing key accounts by driving business process reengineering and developing ROI's for outsourced document management services. Susan also previously served as Vice President of Active Data Services, and was Client Services Manager for Lason Systems Inc.

Susan holds a B.S. in Business Administration from University of North Carolina, Chapel Hill, NC.

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