

Intelligent Automation Trends

How the Digital Workforce Takes Advantage of Document Automation Solutions

Survey Results from 100 Leaders in Document Automation

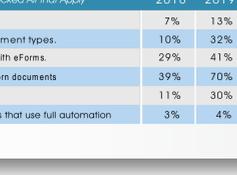
01

Direction of document processing automation over the next three years at your organization

Automation, automation, automation. Major trends are expanding advanced capture, replacing paper forms with e-forms, processing more born-digital documents and expansion to the cloud.

What do you see as the direction of document processing automation over the next three years at your organization? All that apply.

- We plan to expand document processing to more born-digital documents.
- We plan to focus more on replacement of more paper forms with e-forms.
- We plan to focus more on expansion to other scanned document types.
- We plan to migrate to cloud/hosted capture offering.
- Our document processing will be outsourced to service providers that use full automation.

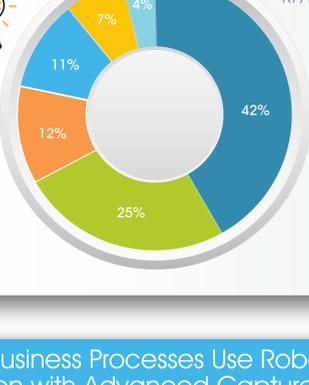


02

Robotic Process Automation: How the Digital Workforce Leverages Advanced Capture

Advanced capture is involved with 10% of existing RPA and almost 25% plan to incorporate it into RPA-based processes.

Robotic Process Automation (RPA) delivers significant benefits in many organizations. Do you have plans for RPA that include processes that are document intensive?



- No Plans for RPA
- Planning to use RPA with advanced capture
- Was Not Aware of RPA
- Currently using RPA with advanced capture
- Currently using RPA without advanced capture
- Planning to use RPA without advanced capture

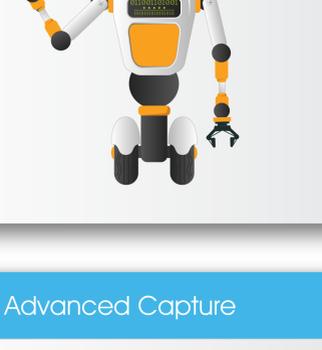
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Specific Business Processes Use Robotic Process Automation with Advanced Capture

For organizations using RPA with Advanced Capture or planning to, these are the top business processes involved.

If you are using RPA with Advanced Capture or are planning to do so what business processes will be involved?

RPA Leveraging Advanced Capture



04

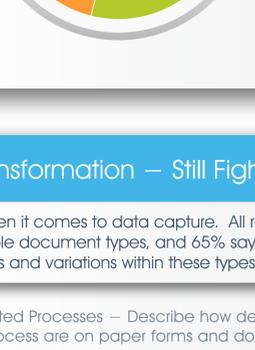
Greatest Weaknesses of Most Advanced Capture

Evidence here demonstrates a shift in expectations for document automation as business users take on capture. Complexity of configuration or learning how to use the software is a major impediment for any organization that wants to leverage document automation.

#1 Drawback in 2018
Limitations of available technology

- Data Retrieval
- Straight Through Processing
- Handwritten data

Greatest Weaknesses of Most Advanced Capture – #1 Drawback or Weakness of Advanced Capture



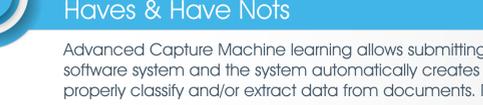
- Inability to extract handwriting on documents
- Complexity of configuration/learning curve to get proficient
- Inability to handle unstructured documents
- Accuracy of the system not good enough
- Inability to work with digital documents without requiring separate configurations or use of OCR

05

Goal: Digital Transformation – Still Fighting a Paper War

Paper is still prevalent when it comes to data capture. All respondents say that they manage multiple document types, and 65% say they have more than ten document types and variations within these types.

State of Document-oriented Processes – Describe how dependent each of the following process are on paper forms and documents.

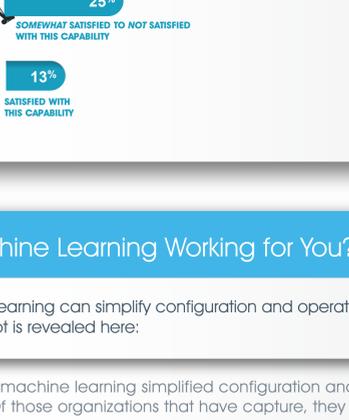


06

Document Automation with Machine Learning – Haves & Have Nots

Advanced Capture Machine learning allows submitting tagged sample sets to a software system and the system automatically creates the necessary algorithms to properly classify and/or extract data from documents. Respondents revealed:

Advanced Capture with Machine Learning – If you have implemented a document or data capture system that has machine learning, how satisfied are you with the machine learning capability?



2018 30% have Machine Learning – How satisfied are you?

- Very Much
- It's OK
- Not So Much

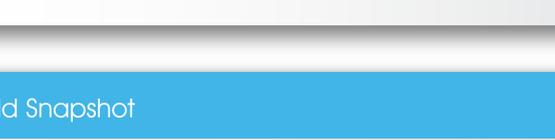
Not So Much & Very Much are tied at 14%

07

Is Machine Learning Working for You?

Machine learning can simplify configuration and operations, but whether it does or not is revealed here:

Has machine learning simplified configuration and operations? Of those organizations that have capture, they answered:



08

Real World Snapshot

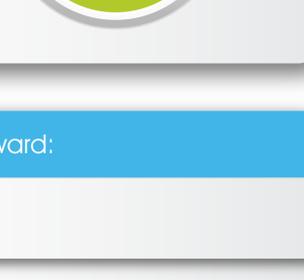
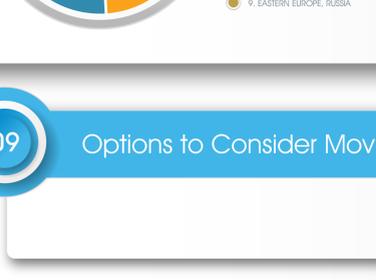
AIIM practitioners provide their experiences and opinions regarding document automation. The feedback is rooted in the day-to-day struggles and successes experienced in organizations today.

The largest percentage of respondents came from these industry sectors:

- Government & Public Sectors
- Finance, Banking & Insurance
- IT & High Tech
- Document Service Providers

LOCATION

ORGANIZATION (SIZE BY NUMBER OF EMPLOYEES)



09

Options to Consider Moving Forward:



IDENTIFY

Identify what you have in both paper and digital form, and know where it resides.



DOCUMENT

Document the processes related to your content and how it interacts with your business processes.



MODIFY

Look for opportunities to modify your workflows to capture this content closer to – if not at – first point of contact.



CONVERT

Convert your paper content to digital form for processing as part of your digital information ecosystem.



ACCESS

Access how machine learning can improve your capture processes and streamline the interactions of content, process, and people.



LEVERAGE

Leverage additional technologies like e-Forms, mobile devices, and cloud, to extend your information ecosystem, to capture and manage your content 24/7 from any where work is performed and content is created.



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