

Six Steps to Better Business Processes With eForms

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Paper: still good for business?

We shuffle through them. Sort them. Scan them. They fall behind desks, are forgotten on printer flatbeds and even, somehow, simply vanish.

Yet, despite the inconsistent handling, open exposure to data loss and detriment to efficiency, we rely on paper forms to capture and deliver the information on which business is based. The business processes used to make decisions about employees, money and mergers is trusted to a business supply as thin on dependability as it is in inches. We believe in a fiction of efficiency because it's always been the way information has reached us, from the Sunday edition to the ditto.

Slowly, and thankfully, a better method of business communication is making its way over the horizon, casting light on new strategies of efficiency and stacks of hidden savings. Connected eForms and logically-automated documents are revealing new ways to run business, making everything simpler, like onboarding new employees or certifying crop seed across the plains of Saskatchewan.

Organizations are learning that by replacing paper, entire business processes can improve. Quickly. Information becomes data so much faster as it bypasses the many planned and unplanned manual steps required to assimilate it to the enterprise.

The true value of eForms then, is not in its substitution of paper, but in its catalyzing of processes.





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Evaluating processes

A large part of improving business processes is deciding which ones will provide the most benefit when translated into the new strategy. This step, in and of itself, often takes substantial collaboration from a wide array of stakeholders, ranging from boardroom leaders to important customers.

Without going too deep into the qualification process, other processes in your road to revenue will inevitably present themselves with opportunity for improvement, further complicating the decision process and in some cases, sending you back to confirm your solution choice.

In short, implementing an eForms-based business process improvement strategy can be vexing, writhing Kraken of stressful decisions, money and conflicting personalities.

LincWare, and the evolution of LincDoc, was inspired by the desire to make things simpler. However, we learned that to be successful in streamlining business processes, you need to willingly accept the challenges of that very process as well. No captain learns his craft on calm seas. But the rewards of port can be many, and long-lasting.

Our developers and decision makers have thrown themselves into the storm of process overhaul and thankfully, reached the realization that the steps needed to implement an eForms and digital capture process are as vital as the solution itself.

The steps we outline here is the method we use when working with direct customers and resellers to implement LincDoc. At first, it was an incoherent, hope-for-the-best approach. As successful case studies emerged and install projects became predictable, we understood that our path should be shared. So this is our map. . .

LincWare, LLC. is based in Rochester, NY and develops LincDoc, an eForms and document automation software.

The software is used in a wide range of applications and has found specific value in human resources, financial services, government administration and mobile business needs. It can be installed in partnership with document management solutions like DocuWare and Laserfiche, and has proven highly beneficial in those cases.

For information on LincDoc, contact sales@lincware.com or visit lincware.com. We're on Twitter, [@lincware](https://twitter.com/lincware). 1.585/563.1669



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1. Find the Troublemakers

It's said the squeakiest wheel gets the grease—an apt cliché for identifying difficult business processes.

Tired terminology aside, in many cases, this where you need to start. And usually, the “squeak” reveals itself in dollars, not a limited turning radius. Our recommendation is to start by identifying which forms in the targeted process is the most operationally and financially draining.

Examine the documents that earn the most mistakes from customers and in turn, require more hours to complete. Is there a required form that's disjointed from the process, increasing delays and challenging deadlines? How about forms with vague fields consistently requiring personal explanations?

Look closely at forms with poor visual designs. Small fields that ask for addresses or full names are often full of unclear

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abbreviations or compact handwriting. Perhaps a minor issue at the surface level, but when compounded throughout the organization, an uncrossed “t” can cost thousands.

Documents that require addenda have the potential to multiply delays by becoming lost and separated. They also demand that

personnel be highly cognizant of their value to the parent form. When does it get included? If so, is it up to date? Each form required to create a final document package delays the pace at which its information becomes data the company can use for business. Also, related forms can magnify the scope of scanning operations.

Chances are it won't be difficult to locate the most problematic forms in your operation.



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2. Circle the Wagons

Who are the stakeholders in the targeted forms, and how do they contribute? Let's get together to specify the problems and uncover their benefits.

While identifying the forms—and thus business processes—to be automated, you probably came across a number of individuals within the enterprise who could be considered stakeholders, the folks whose fingerprints are on the evidence. These are the teams with the most to contribute, who will be readily comfortable discussing the challenges your processes pose to the profit margin.

In addition to being able to recognize and develop avenues of efficiency, form handlers will become a source of productivity for the organization after the solution gets installed.

Remember that these are the teams whose jobs will be most impacted by the connectivity of their core competency. And yes, as a result, egos will be challenged and insecurity may proliferate. Morale will become an issue if the intent is to do more with less with the intent of downsizing. Proceed with caution if this goal of the transition into eForms.

Smart organizations will benefit greatly by trying to limit any these negative reactions to automation. In many cases, stakeholders can become those through which the new processes flow, i.e. LincDoc users. Communicate that their job is not (necessarily) going away, only becoming easier and in fact, more valuable.

“Stakeholders can become those through which the new processes flow.”

The more seamless and positive this step of the process can be, the sooner your return on investment can be measured.



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3. Round up the Data

Now that we know who, we can start to determine "how."

By taking a granular look at the information being collected, you can ensure that you're asking the right questions and using the right methods to capture it. Additionally, every examination of your methods provides an opportunity to qualify their role in the enterprise.

Based on the knowledge gained in steps one and two, you should have a clear picture of what information you need to power decisions and the methods you use to capture it. At this point then, it pays to examine the combined impact.

For example, *"Is there a better way to capture what we ask for in Form 10-G? Can it be included in Form A6?"*

"It is in this step that we find true efficiency."

Focus on efficiency and ways to consolidate your requests for data. Requiring fewer steps to gather what you need will result in higher quality data and more profitable output.

This is a critical step in integrating your business logic into the automation capability of LincDoc. It is in this step that we find true efficiency. With a wide view of the form and data landscape, you can get a much more vibrant look at where you need to be.

By identifying the methods and operations used to capture data and get into the systems that need it, we can uncover additional opportunities for efficiency.



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4. What's in the Corral?

What tools, systems and software being used currently will have a role in the automated process solution?

It's critical to determine what enterprise systems will at some point along the way interface with your new solution for automating document processes.

At what point in the process will your information need to merge with what you already use to support operations?

Document management systems or anything in the Enterprise Content Management space are naturally good benchmarks on which to formalize an eForms solution, where web-captured data is pushed into an existing system like DocuWare. Perhaps Laserfiche.

The way these resources interact is crucial to ensuring a streamlined implementation. Even though document management and eForms overlap in a number of core benefits,

they remain functionally disparate and designed for specific tasks within the greater ECM universe. Where one type of system may excel in scanning and whole-document capture and

archiving, LincDoc's role is on the critical front-line of logical, web-based information gathering and process improvement.

In most cases, a sound eForms system will be able to fluently

communicate with any legacy tools in the quiver—a vitally important asset to success. Being able to use the data that already exists, having it talk fluently to your current systems and your eForms tools, creates a ripple effect of productivity. Making sure that it does will offer reassurance of investment and also open up new paths to productivity.

Remember, uncovering opportunities to reduce the number of keystrokes needed to get customer information into your system should be considered paramount to your BPM effort.

“LincDoc’s role is on the critical front-line of logical, web-based information gathering and process improvement.”



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5. Collecting the Bounty

How exactly does your data produce a benefit to the enterprise?

The information subject to your automation overhaul: how does it produce a return? What is its measurable value to the company mission?

Tough questions, but necessary.

Using your current paper-based processes, look at the outlet for the data to determine how the new faster processes will impact what it provides your operation. In other words, test it. Make sure no value is being lost along the way. Like a new plumbing system, you have to look for leaks. And similarly, you have to gauge for improvement.

In most cases, an automated process overhaul comes with quick return on investment. This is because the role of the information is not changing, the processes used to leverage it

have become substantially more effective.

When critical information is able to enter the

organization more intelligently, there are untold byproducts of efficiency that emerge to bolster the revenue stream.

“An automated process overhaul comes with quick return on investment.”



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6. Guarding the Fort

With everything up and running, maintain surveillance of your new processes.

Newly automated business processes begin to erode the walls of inefficiency rather quickly. In the wake of progress will come a number of new ways to repurpose resources and opportunities to further automate those.

Moreover, as your comfort level grows with the benefits of having more, better information, attention can turn to subservient processes in other departments, locations and even with external partners.

Keep an eye on any updates to systems working in unison with your eForms tools. And, actively seek ways to mobilize any customer-facing processes. As web-based resources, eForms and automated documents can take smart data capture anywhere an iPad can go.

“eForms and automated documents can take smart data capture anywhere.”



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ADDENDUM – Discovering your ROI

Correlated with the first five steps, use these suggestions as a baseline to measure your return as you implement eForms-automated business processes.

Finding the Troublemakers

In this stage, you'll want to examine carefully the extra hours used in fixing the mistakes, delays and challenges of your worst forms. This is where money becomes unaccounted. Look at the issues that made you identify the forms to be converted. For example:

- General overhead for the team in charge of the process
- Total time/day spent on manual data entry and capture (scanning)
- Total time/day spent on "putting out fires" within your processes
- Total time/day spent verifying form and data integrity. Is it the right form? Is it the right version of the form? Are the names correct in each field?
- Any fees involved with a form? How much time is spent collecting and processing them? What additional costs are incurred to handle transactions?
- How much paper and printing is used before a document is ready for processing?

Circle the Wagons

Here's where you'll want to examine how each stakeholder's role contributes to the overall cost of the process, carefully considering:

- How is the data sent from one stakeholder to the other? Fax? E-mail? Hard copy mail? What does the strain of each delivery method cost you?
- Does each stakeholder cost the organization more per hour? If so, the cumulative impact can be staggering for even a single form. If only a single "approval" is needed by another individual, how much is that approval costing you?
- Time delays. What is the time drag between stakeholder contributions? Delays are costly.
- Are there internal organizational contradictions in your process? In other words, has a specific department out-grown its role in the process?
- With each step in the process, how many versions of the document get created and how does risk build with each version?

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Round up the Data

You'll uncover savings by recognizing where your process is redundant and where in each step improvements can be made.

Also, you can determine how much energy you are expending for your information.

Consider examining:

- Can multiple forms in your process be collapsed into one? Or at least fewer? Each instance of elimination can provide considerable savings.
- Is the problem coming from somewhere else? It may not be the forms and documents, it could be the very nature of what you're asking for? The ripple-effect of closely examining your business logic can produce returns quickly.
- What about capture equipment costs? What's it take to maintain scanners and printers and workflow systems that a smarter, automated process could bypass?

What's in the Corral?

Finding a return on your investment in this phase will involve examining the costs of getting your data into your current systems.

- Average time entering data into existing systems per software license
- Cost of capture methods. If scanned by bar codes, what's the cost to imprint the code and in turn, print the documents to be scanned?
- Cost associated with risk of incorrect information being input. What safeguards are in place to reduce that risk, and what do they cost you?
- Have previous attempts to automate processes resulted failed to connect to your existing systems? Is it worth going through again?
- Cost of specific users or system experts for your current workflow tools?
- How much can be saved if your data is automatically integrated with your existing ECM resources?

Collecting the Bounty

You may find that some aspects of your processes are more valuable to the enterprise than others. You should also examine the time it takes for your information to produce a return. Consider

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- How much time is spent between information capture and realization of its value?
- What value can be applied to any new areas of efficiency uncovered by automating processes?
- If specific stakeholders or technology was eliminated in the overhaul, what is that value?
- What value can be attributed to the additional flow of information now possible because of automation?
- What savings can be assigned to process teams being more efficient?