Digitisation Trends in the Private Sector
Presentation Overview

Introduction

3 Types of scanning solutions

5 Lessons from Digitisation

Case Studies
Introduction

- **Daniel Warren-Smith, Sales Director and General Manager - Document Management Solutions**

- **First scanning project – 2003**

- **Digitisation experience includes Project Management, Operations, Solution Design and General Management**
Scanning Solutions

- Pre Process (S2P)
- Post Process / Archiving (S2A)
- Legacy Conversion (IOD / Backscan)
Scanning Trends

Integrated Value Chain

Innovation is in the Business Model

Niche Solutions vs Big Bang Transformation
Five Lessons...
“It’s not a technology problem”

- Capture
- OCR / Automated Data Extraction
- sFTP
- Reconciliation
Case Study: Mortgage Document processing

- Remote Capture (6 locations)
- OCR conversion
- Auto document classification
- Auto Data extraction
- Drip feed file transfer
“Understand the Value Chain”

- Remote vs central capture
- Ingestion: Fax / Email / Scanning
- Movement of data via sFTP
- 3rd party interactions
- Business Continuity
Case Study: BPO Outsourcing/offshoring

- Mail Collection
- Capture: Minimal data extraction / transformation
- Dripfeed sFTP
- Offshore processing partner
- Paper archived or destroyed
“Simple solutions are best”
Case Study: HR Document conversion

- Legacy document backscan, plus day forward scanning / digitalisation
- Every document classified: over 60 document types
- Data extraction - employee name +++
- Compliance check: what’s missing?

“Nice to haves” vs “must haves”
“The Business Case is Never in the Paper”

- Storage Cost?
- Access Cost?
- Customer service?
- Process Automation?
- Risk?
Case Study: Customer Credit Files

- 30,000 paper credit files stored on site in filing cabinets, serviced by Payables team
- Solution: Back scan + day forward conversion
- Benefits: storage + process efficiency + customer service + risk + audit
Digitisation vs Digitalisation

- Wholistic process view vs archiving problem
- Removing paper from the process with electronic forms
- Is scanning a sunset industry?
Case Study: Digital Mailroom - insurance claims

- Digitsation of insurance claims, direct from PO Box

- From RFP to project inception, paper volumes reduced by 25-50%
  - Email ingestion
  - Online portals
  - Mobile capture
In Closing

• **ALWAYS look at the process, not the technology**

• **Anything is POSSIBLE…Keep solutions SIMPLE**