

# ***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*)**

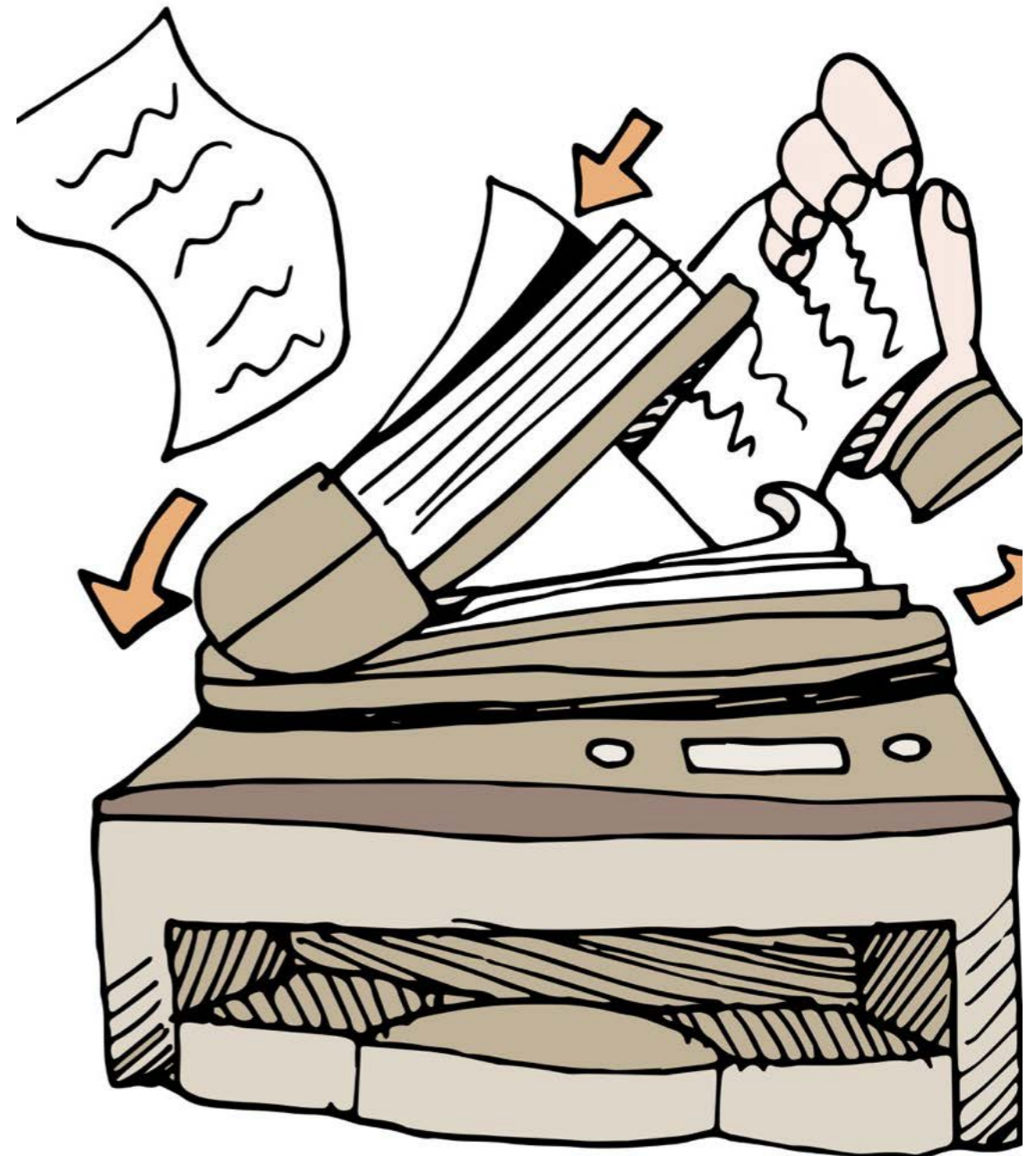


# ***Five Lessons...***



# *“It’s not a technology problem”*

- Capture
- OCR / Automated Data Extraction
- sFTP
- Reconciliation



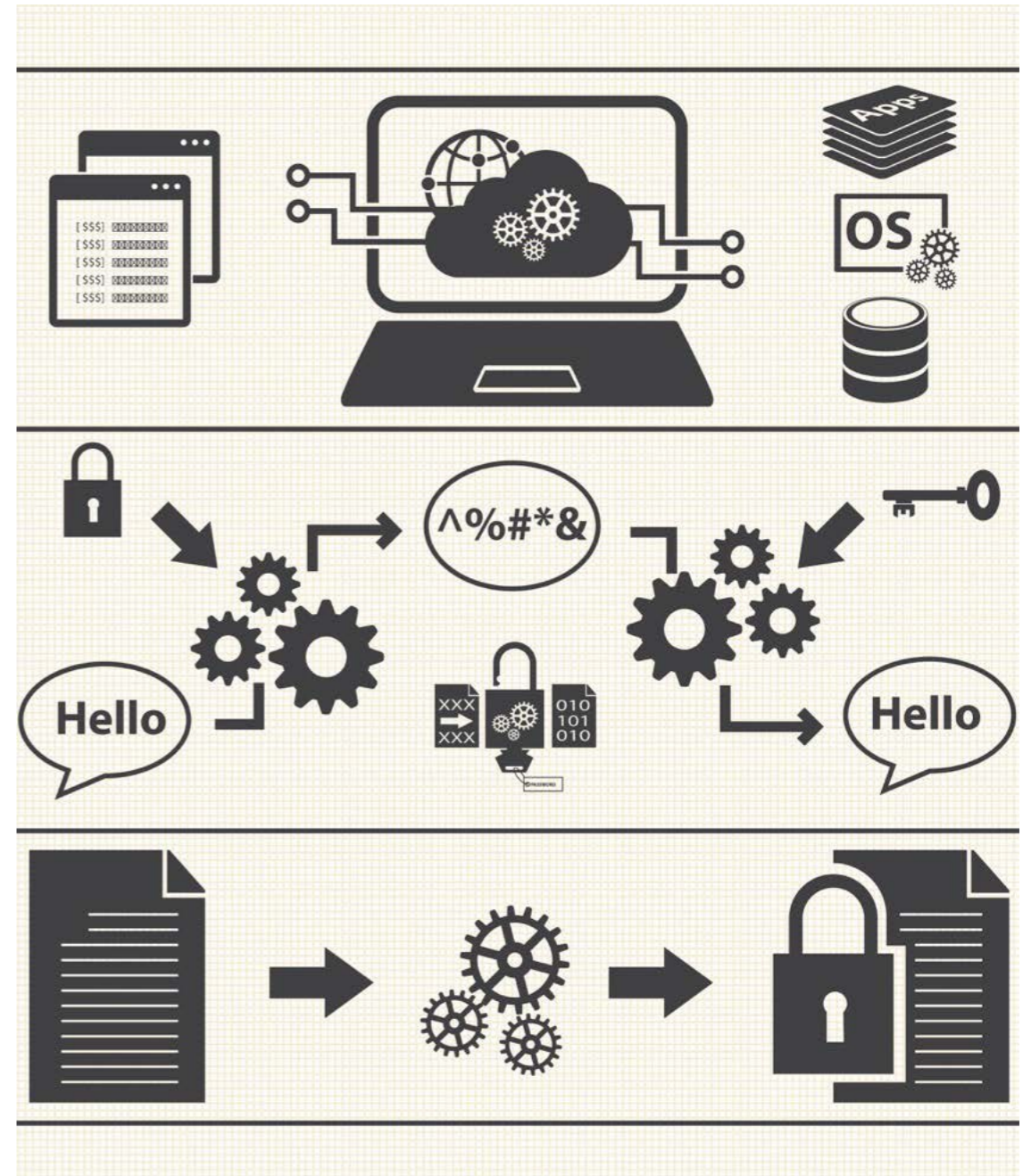
# ***Case Study: Mortgage Document processing***

- 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***

- Digitisation 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***

Thank You

