

Xerox® DocuShare® Flex
Content Management
Platform

Partner Guide





Why are so many companies interested in digital transformation?

87%

Of companies believe it's a competitive opportunity
- CapGemini

2/3

Of G2000 CEOs will have it at center of their strategy by 2018
- IDC

55%

Of organizations with no digital strategy say they must have one within a year
- Progress

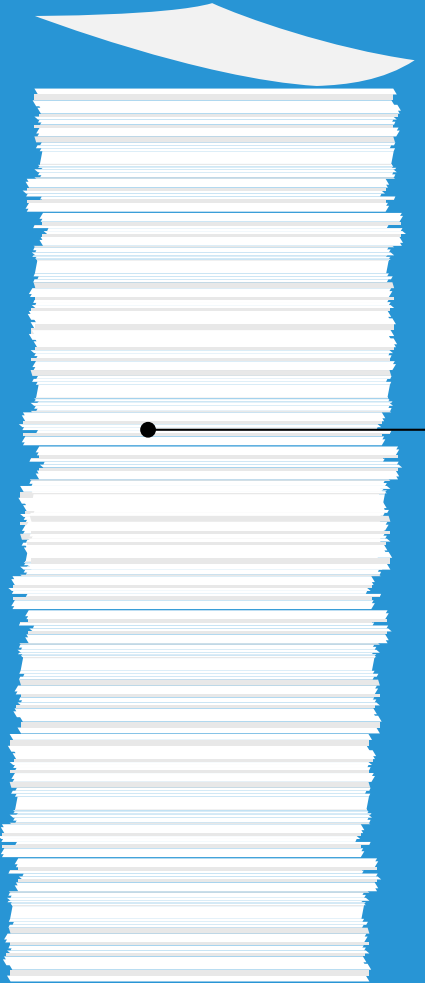
27%

Of executives rate it as a "matter of survival"
- CapGemini



Benefits of digitizing and automating documents and document-centric processes

Automating document processes leads to:¹



41%

increase in productivity overall



12%

less time overall searching for lost or misfiled information



52%

fewer errors



17%

less time weekly spent on document-related tasks



42%

fewer paper documents in the office



35%

cost reduction



41%

lower cost to store documents



3hrs

per person saved weekly on document tasks

Also consider the need for Governance:

10%

Said they had a data loss or difficulty finding information in the last year²

1. Source: "IDC Survey Spotlight: What are the Benefits of Digitizing, Automating and Optimizing Document-Centric Workflows?," June 2017, IDC #US42772417, by Holly Muscolino
2. Source: "Governance and Compliance in 2017: A Real World View," 2017, AIIM Industry Watch, by Bob Larrivee (www.aiim.org)

Are you interested in digital transformation?

Challenge Area 1:

We need to drastically reduce paper in our organization.



Files

TOO MUCH CONTENT IS STORED IN MANY FILING CABINETS.



A great deal of content is still stored on paper which slows our business processes. It makes filing content and then finding and retrieving it from sprawling files and folders a nightmare. Not only that, information in paper files is difficult to secure while also making it accessible to multiple users.

Archiving

ARCHIVING REQUIRE COSTLY OFFSITE STORAGE.



Having important documents in off-site storage poses additional challenges because it can take days to retrieve a document. It is also a significant expense. Moving this content to a secure, private cloud-based content and workflow management platform could save a considerable amount of money and significantly boost productivity by giving users instantaneous access to all this content.

Audits

PREPARING FOR AUDITS IS A DRAIN ON PRODUCTIVITY.



Creating and saving content has never been easier. The problem is finding that content afterwards. Without an enforced tagging strategy, or content location strategy, content can end up anywhere, even outside the enterprise.

Users need quick access to documents whenever they need it. Being able to quickly search for and find documents is critical for business productivity.

“Our clients just want answers, and with our DocuShare solution we can often provide answers before they’re even finished asking the question. This impresses our clients to no end, and positions us powerfully versus the competition.”

Paul Freedman, Owner, **Freedman & Co. CPA P.C.**



Challenge Area 2:

We need a secure location to easily store *and find* documents and content.

Centralised

WE NEED A CENTRAL REPOSITORY FOR CRITICAL COMPANY DOCUMENTS.

Organizations often struggle to unify their information sources, leading to work and process inefficiencies. As information sources grow more diverse, critical resources spend significant time searching for the information they want and then wondering if they have the latest version – “the one version of the truth” – they need to make the right decision.

We need a way to track versioning and disposal; a way to manage the entire document lifecycle.

Mobile

A CLOUD SOLUTION WILL SERVE MOBILITY AND PARTNER USE.

Our file servers do not have the technical features and functionality needed to enable employees to be productive while mobile, so mobile workers, partners and suppliers often use email for collaboration and content sharing. Unfortunately, email lacks the versioning and security required to protect confidential company and client information. Cloud storage or Cloud ECM is an effective way to lower costs and enable secure external collaboration and increased mobility of documents.



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Compliant

WE NEED TO COMPLY WITH GOVERNMENT REGULATIONS, PRIVACY AND LEGAL RULES.

Many documents are subject to regulation – such as HIPAA in the U.S. and GDPR in Europe – and must be retained and kept safe for years to comply with government rules on records management.

Guidelines apply for managing not just the documents but critically also, the data they contain, for example identifying and redacting sensitive data.

We need a way to know exactly where personally identifiable data is stored; and then control access, use and disposal.

Secure

WE NEED TO USE OUR FILE STORES OR CLOUD STORAGE MORE EFFECTIVELY.

Users need quick access to documents whenever they need it. Being able to quickly search for and find documents is critical for business productivity.

Organizations often find themselves struggle to unify their information sources, leading to work and process inefficiencies. To ensure strong information governance practices, organizations must consolidate their content assets to one or two main repositories at the most.



Challenge Area 3:

We need to replace our outdated, inefficient paper-based processes with an automated

Speed

WE NEED TO DIGITISE OUR MANUAL PROCESSES TO SUPPORT HOW PEOPLE WORK.

Manual, paper-based processes are slow and extremely error prone, with information difficult to find when it's stored in multiple places.

We need to digitise these processes, to help people work how they want to work. That way, we can electronically capture, store and easily find all our documents from a variety of file formats, and store them in a single repository. This will give staff timely and secure access to needed documents.

Security

WE NEED IRONCLAD DOCUMENT SECURITY.

Not having granular control of document security is a common problem if file shares are used to store documents. It raises a lot of questions and concerns. How do I make sure that the right people have access to mission-critical documents? How to be notified when content is modified? How do I control who can see what?"



d digital workflow.

Productivity

WE NEED TO CLEAR OUR PROCESS BOTTLENECKS THROUGH AUTOMATION.

My business processes require too many offline transactions preventing me from reaching our true business potential. These largely paper-based processes are time consuming and labor intensive.



“Our highly qualified offshore engineers previously had to rely on their office-based colleagues to amend documents and procedures and then pick them up when in port. Now, onshore and offshore personnel can work on the same document together, improving both productivity and job satisfaction.”

Per Arne Stromo, IT Manager, DeepOcean

What Are Your Document Challenges?

My small to mid-size business, or department, faces industry-specific pains with paper and legacy workflows.

Accounting

WE STRUGGLE TO MANAGE INVOICES EFFECTIVELY

My accounts payable department has many incoming invoices, many on paper which can't be quickly processed or automatically matched with our accounting systems. Invoices may be in many other formats – email, PDF, Office documents. It takes significant time to approve and pay invoices in a manual process, so we lose early payment discounts.

Contracts

WE NEED A BETTER WAY TO APPROVE AND TRACK CONTRACTS

My organization depends on contracts, but it's a challenge to create them in a consistent format, with edits and approval tracked for compliance and good record-keeping, and a legal signature. And with so many contracts, it's difficult to find a contract quickly, or anticipate when a contract will be up for renewal.



Human Resources

WE CAN'T KEEP TRACK OF ALL OUR HR DOCUMENTS

My organization deals with many, many Human Resources documents—from employee records we must keep for legal reasons, to forms and manuals that need to be available easily. We need to grow, but it can be cumbersome managing documentation for hiring with routing resumes, tracking applications and filling out documents when a new employee is hired.

Policies & Guidelines

IT'S CRITICAL THAT WE KEEP POLICY AND PROCEDURE DOCUMENTS UP TO DATE

Our employees must follow our company policies, to keep up with industry standards and in case of auditing. But many policies change frequently, and it's difficult keeping up to date—especially if they're kept on paper. But for compliance we need to make sure staff have access to the latest policy information, and are notified when there's a policy change.





Education

OUR SCHOOL, MUST EFFICIENTLY MANAGE STUDENT RECORDS AND OTHER DOCUMENTS

Our institution is overflowing with paper, forms, and many administrative processes that must run smoothly, from student admissions and registration, to storing student records according to legal requirements. We have tight budgets but must still allow students, teachers, and parents to efficiently share and access educational materials.

Healthcare

OUR CLINIC MUST DIGITISE, SO WE CAN FOCUS ON PATIENT CARE

As a smaller organization focused foremost on patient care, we need ways to efficiently and securely manage patient records, give clinical staff access to guidelines and easily manage billing.

Government

IN OUR PUBLIC AGENCY, MANY PROCESSES ARE STILL PAPER-BASED

In addition to the challenges of paper documents, it's increasingly complex to keep information secure. Today's citizens expect new, convenient ways to interact with their government agencies when they request services. We need to manage documents efficiently—from agendas to public records—while delivering innovative services that citizens expect.

Legal Archive

WE MUST MEET COMPLIANCE REQUIREMENTS FOR ARCHIVING DOCUMENTS

Our organization must meet industry or business requirements to guarantee we don't lose or misplace critical documents. We must not only minimize risk of lost information, and be prepared for audits, but also meet requirements to keep records a particular length of time, and then efficiently archive or delete them.

Financial Services

OUR INSTITUTION NEEDS EFFICIENT, SECURE WAYS TO MANAGE CONTENT

My bank, agency or department has paper-based processes such as client onboarding, handling claims and archiving that mean safely managing many financial and client documents. We need to transform our processes to digital, so we can efficiently access documents, comply with legal guidelines and serve our customers.

Manufacturing

OUR MANUFACTURING PROCESSES RELY ON DOCUMENTS AT EVERY STEP

In our manufacturing organization, we rely on documents that are critical to a range of jobs—from technical guidelines, to engineering and R&D drawings to safety forms and policies. It's also critical that we can effectively do change management. We need ways automate these processes, and add efficiency to our supply chain.



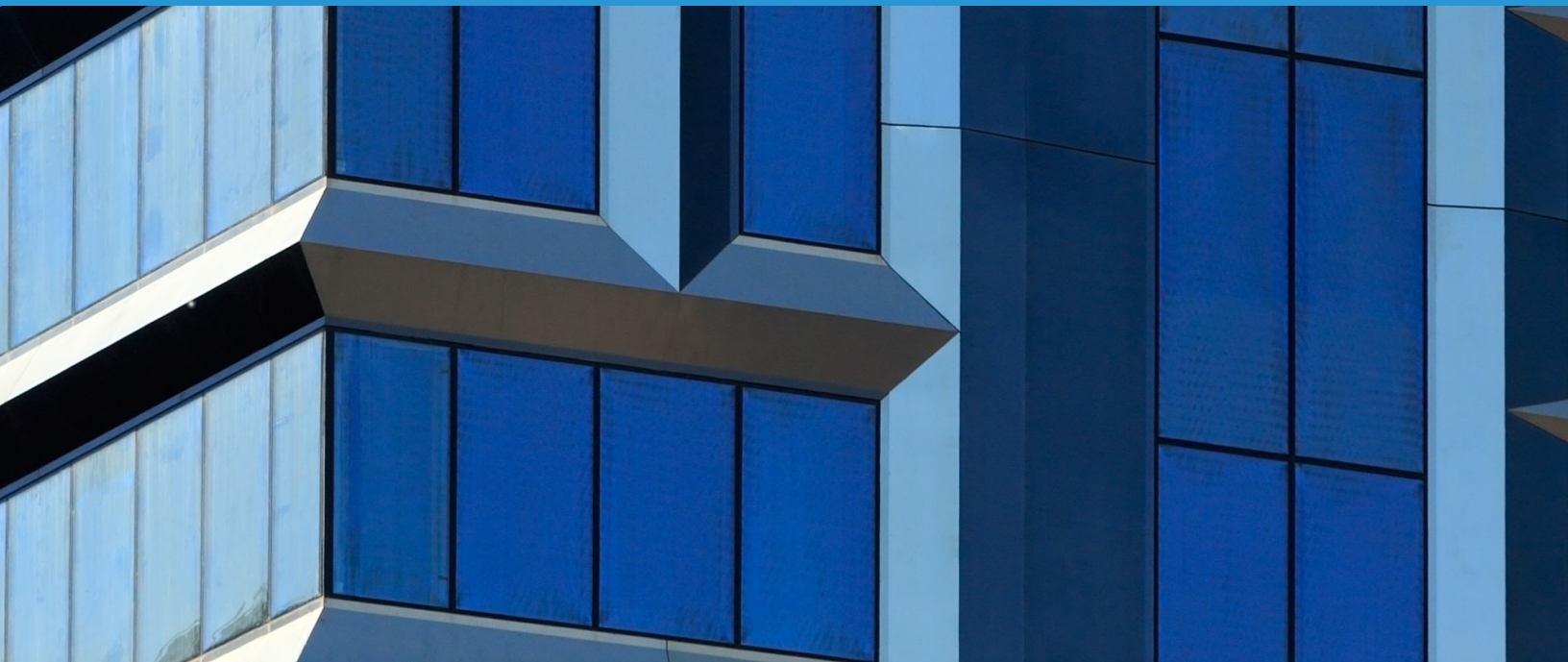
“Rigorous management of documentation is essential to safety in aeronautics. Now we no longer have to worry about helicopters being stranded on the ground for want of the paper documents.”

Luca Maragnani, Head of Material Safety Delivery,
AgustaWestland



Challenge Area 4:

We need to see how other companies are becoming more competitive through digital transformation.



Engineering Firm Looks to Control Design Review Process and Costs

Use Case



BUSINESS PROBLEM

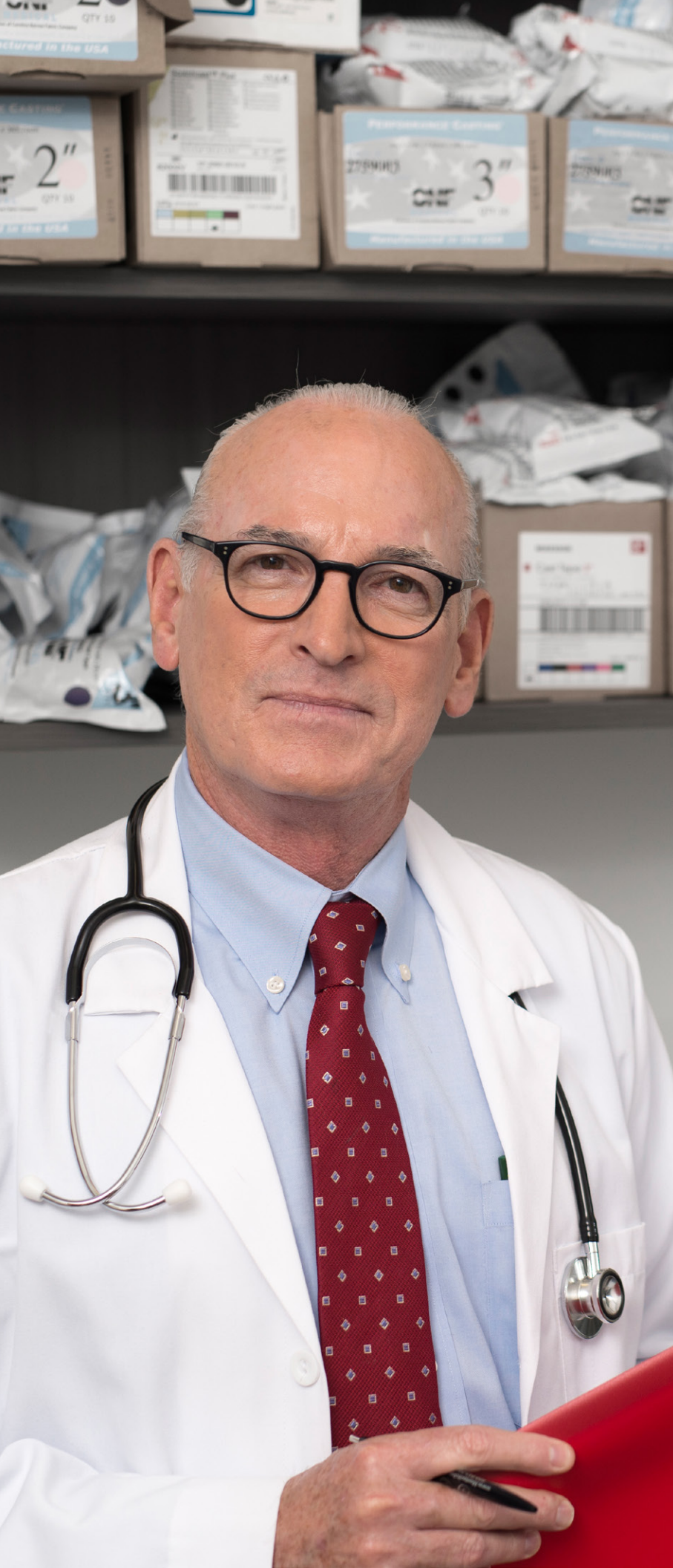
Engineering teams need computer-aided design (CAD) software for their work. Expensive per-person software costs limit how many team members can review and change designs. For small firms and departments, cost is a barrier to collaboration and productivity.

SOLUTION

An engineering department in a large bank uses Xerox® DocuShare® Flex to take advantage of the integrated document viewer, letting multiple team members to annotate and track comments on architectural designs without costly per-user CAD licenses.

OUTCOME

DocuShare® Flex offered an alternative that was a 60% cost reduction to CAD licenses. Productivity also improved, as all team members can see all comments in one place, with tracked versions.



A Regional Medical Center Meets Their Compliance and Policy Needs

Use Case

BUSINESS PROBLEM

To stay compliant in managing their policies and procedures, a medical center adopted a cumbersome, manual process that requires dedicated IT and Business support teams to meet KPIs. This process was error prone, causing operational inefficiencies and unwanted costs.

SOLUTION

DocuShare® Flex was chosen as a solution to manage content and automate business processes. Document management, versioning and Content Rules capabilities in Flex were used to manage policies, and Task Acknowledgements to track user compliance.

OUTCOME

With the streamlined process, automated tasks, and tracking, DocuShare® Flex not only solved the customer's document management needs but also helped reduce operational costs by 80%, with software and hosting included.



A Clothing Company Streamlines Their Accounts Payable Processes

Use Case

BUSINESS PROBLEM

To maintain good standing with their suppliers, a mid-sized clothing retailer was using unrelated sets of technology tools, file systems and manual processes to manage their accounts payable process. The process lacked a cohesive integration strategy, and was non-compliant with industry guidelines and time consuming.

SOLUTION

DocuShare® Flex, integrated with an enterprise capture solution, is now used to automate the vendor onboarding and accounts payable processes. Notable capabilities include data capture from incoming supplier invoices, automatic validation against the Lawson enterprise resource planning (ERP) system, automatic data entry and archival of invoice images to Lawson.

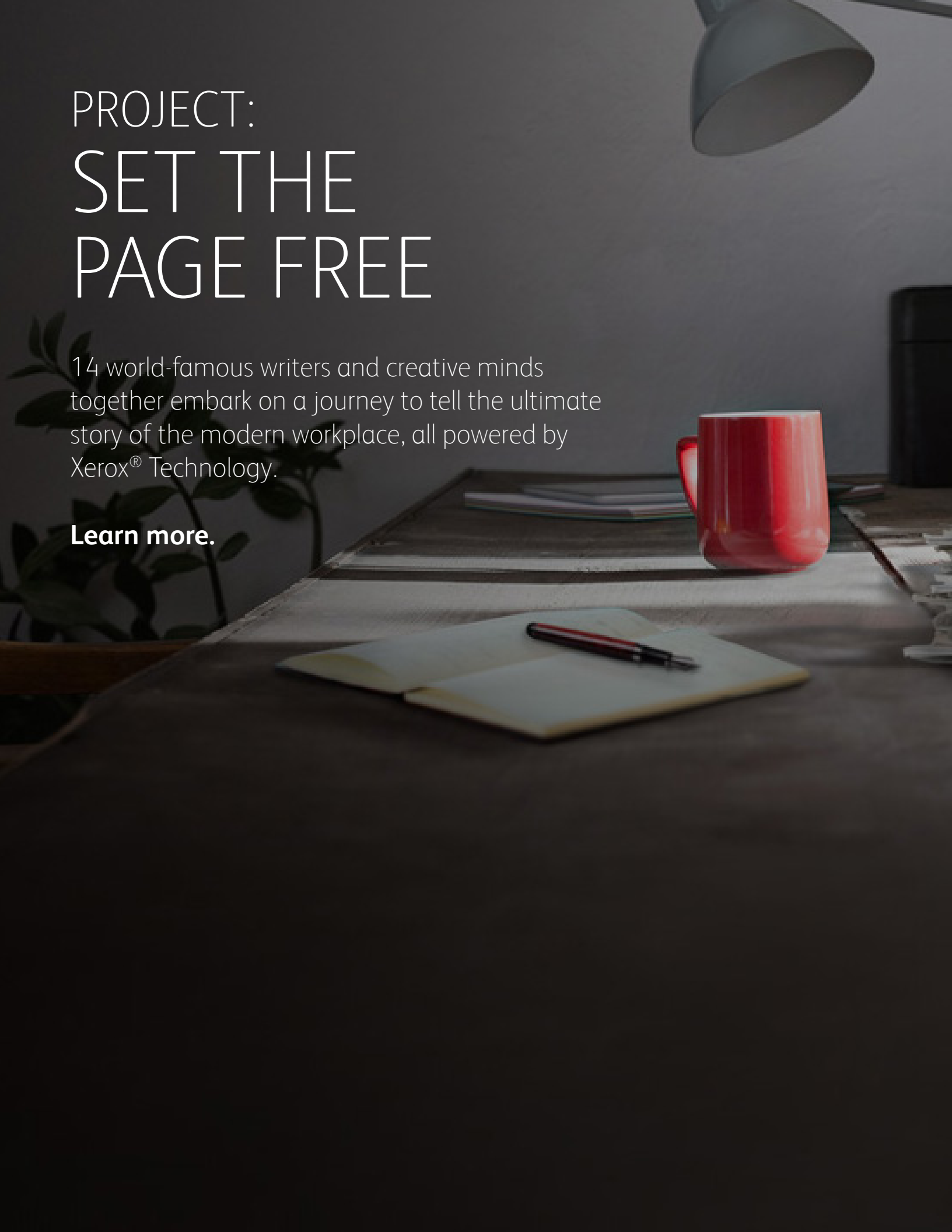
OUTCOME

A streamlined business process and integrated solution helps the customer meet their vendor transparency and compliance goals. Process efficiency grew by 40%, with 52% reduction in costs in labor and infrastructure.

PROJECT: SET THE PAGE FREE

14 world-famous writers and creative minds together embark on a journey to tell the ultimate story of the modern workplace, all powered by Xerox® Technology.

Learn more.



Opportunities:

A Digital Solution Lets You:

- Manage content and business rules to control, drive, and monitor processes.
- Store, share, annotate, and redact information on key documents.
- Capture, classify, and index documents with document types and properties.
- Create and manage workflows through tasks with escalations.
- Collaborate on document changes with document versioning, routing and annotations.



You're interested, what's next?

QUICK QUESTIONNAIRE: YOUR ORGANIZATION PROCESSES

Who owns the senior responsibility for change within your organisation?

- Who is responsible for organisational transformation? And for operational document management processes?
- And who has a strategic view of the quality, impact and cost of the existing approach?

Identify and prioritise the processes to tackle

- What are your current “paper-driven” business processes?
 - How many are customer facing?
- Do you have any documents you can't afford to lose?
- What is your liability if unauthorized people view documents or files that contain sensitive information ?
 - How do you share information with others?

SCOPE THE NEXT STEPS

Let Xerox demonstrate it to you (via DocuShare® Flex).

- Set up a meeting with Xerox or our partner to see how it works live.

Work with us to build a business case for change.

- Let's walk through an evaluation of your process and create a plan for transformation.