

Power Your Process

How RPA + Capture Empower
Your Customer Journeys



Work Like Tomorrow.™

KOFAX

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Introduction: Customer Outcomes are Driving Digital Transformation

“Only after knowing what jobs customers are trying to get done and what outcomes they are trying to achieve are companies able to systematically and predictably identify opportunities and create products and services that deliver significant new value. Only then can they figure out What Customers Want.”¹

The conversation has shifted. We used to talk about going paperless, then about going digital. But “going digital” just created new complexities in the form of new information types—PDFs, emails, data files, websites and portals, and mobile formats like photos and apps. We wanted to offer new channels to our customers, but struggled to connect them with our core systems. For a time, “going digital” actually made the customer experience worse, with technical limitations, integration issues and the inability to collect and verify and process and surface the right information at the right time.

Forward-thinking organizations have started to realize that digital transformation is most successful when driven from the outside in, when we look first to what customers are trying to accomplish on their journey with us, and design processes around that.

Automation is key to creating seamless customer experiences, but the challenge is in reinventing our legacy processes and systems for receiving, extracting, sorting, routing, acting on and integrating the vast amounts of information that arrive in our offices every day.

**Automation
has the potential**

to transform unpleasant experiences and greatly improve how customers interact with a brand.²

**Automation is one
of the most profound
and disruptive forces in human history.**³

¹ Anthony W. Ulwick, What Customers Want: Using Outcome-Driven Innovation to Create Breakthrough Products and Services

² Blake Morgan, Customer Experience Futurist

³ Forrester, Predictions 2018: Automation Alters the Global Workforce

Pop Quiz: How Painful Are Your Document Processes?

Does your organization struggle with slow, manual, error-prone or expensive processes related to:

- ✓ **Extracting and aggregating information** from electronic data sources such as websites, web apps, desktop applications and databases
- ✓ **Receiving documents** from multiple channels in multiple formats at different times from customers and partners
- ✓ **Sorting, separating and classifying** large volumes of structured, semi-structured and unstructured documents
- ✓ **Manually entering data** from documents to trigger the start or resumption of business processes to which they are vital
- ✓ **Surfacing the right information** at the right time for the right people
- ✓ **Error-prone, repetitive data entry, aggregation and migration** tasks that require individuals to collect information, log in and out of multiple systems, and copy and paste data between different sources and formats

“Digital business is the creation of new business designs by blurring the digital and physical worlds. It promises to usher in an unprecedented convergence of people, business and things that disrupts existing business models—even those born of the Internet and e-business eras.”⁴

⁴ Jorge Lopez, Gartner

Data is on the Move

A typical business receives information from many channels. That information is delivered into various processes, both customer-facing and behind the scenes. A key to customer-centric digital transformation is streamlining and automating to deliver faster, reduce errors, encourage self-service, and connect people, processes and systems.

“Digital acceleration has pushed legacy capture solutions to their limits. The pixel mindset of the last three decades has given way to smarter solutions that manage more channels, formats, and pricing models. Capture on-demand, renewed interest in e-forms, page analytics, and mobile capture now define the future.”⁵

The Secret to Customer-Focused Process Automation

Combining **robotic process automation** (RPA) with **document capture** and **transformation** to process and deliver information, no matter the format, to the right people and systems is your secret weapon for creating a smooth customer experience. Like peanut butter and jelly, RPA and capture are great alone, but exponentially better together.

⁵ Craig Le Clair, Forrester Research

From Paper to Processes: An Automation Journey

Paper is hands-down one of the most important inventions in the world. Long before paper, people were recording their most important thoughts on caves and wood. In business, paper reached critical mass, moving from the mailroom to cubicle inboxes to file folders and storage units...then back again. In fact, a typical employee uses 10,000 sheets of copy paper every year and spends 30-40 percent of their time looking for information locked in email and filing cabinets.

Paper was great, but there had to be a better way.

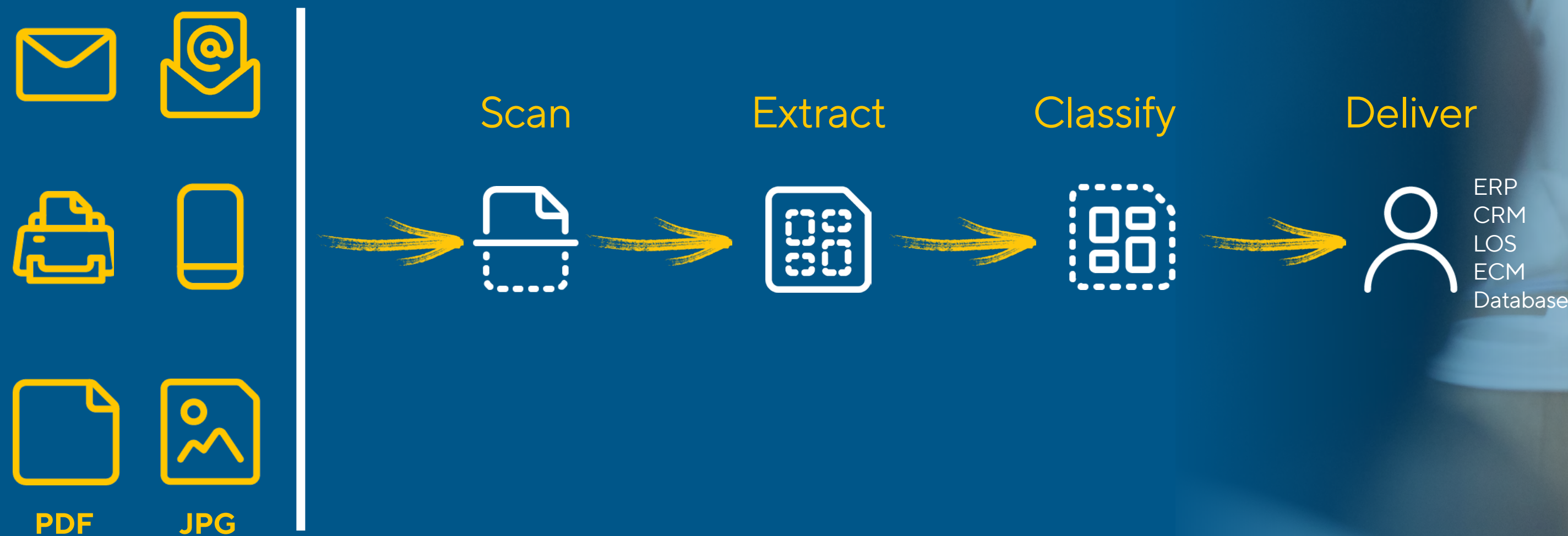


From Paper to Processes: An Automation Journey

Tired of searching for paper files in far-off filing cabinets for customers fed up with our slow response times, we began to digitize paper documents and store them electronically.

Then we added complexity in the form of new digital data types—PDFs, emails, data files, photos, and more. We needed a way to scan, index, extract and classify all that information and deliver it into core business applications, processes and workflows so it could be easily accessed in customer engagements and back-office processes.

The solution: **Multichannel capture.**



From Paper to Processes: An Automation Journey

Multichannel capture transformed the way and speed at which organizations processed and used content, but there was still something missing: Certain activities like collecting information from portals and databases and email inboxes and delivering it to the people and systems still had to be done by hand. Enter **robotic process automation**, the secret weapon for transforming slow, manual legacy processes into automated, real-time, error free workflows.

Pairing robotic process automation with multichannel capture to connect people, processes and systems is the key to creating an incredible customer experience.



Real-World Results: How RPA + Capture Deliver a Seamless Customer Experience

Safe-Guard Products Adjudicates Claims 75% Faster

Safe-Guard approached digital transformation holistically, beginning with the ideal customer experience and transforming processes across the company in pursuit of it. Preliminary results? Increased customer satisfaction by 15 percent, an excellent metric in an increasingly commodity market.

The Problem

Every year, Safe-Guard Products processes more than 2 million contracts and thousands of claims. A prompt response to customers is the difference between customer satisfaction and customer attrition to more agile competitors.

The Solution

Safe-Guard knew if they could provide greater transparency and efficiency in customer engagements, they could deliver consistent high-quality experiences. Automating the contract and claims submissions process was one piece of the puzzle, and speeding the claims payments process was another. A combination of self-service customer mobile capture and back-office document capture and management and robotic process automation is ideal for automating these document-heavy processes.

Outcome

- *Adjudication times reduced by 75%*
- *Productivity boosted by 30%*
- *Reduction in status check calls from customers of 25%*

[Read the full story >](#)



Real-World Results: How RPA + Capture Deliver a Seamless Customer Experience

Delta Dental of Colorado Lifts Customer Service to New Heights

Delta Dental of Colorado's digital transformation initiative has made the company much more agile and able to turn customer and provider requests around, "**blowing competitors out of the water when it comes to turnaround times.**"

The Problem

Large volumes of paper files made tracking document workflows difficult—not to mention accessing documentation efficiently in the course of daily communications with dental providers and customers.

The Solution

Delta Dental of Colorado embarked on an ambitious effort to replace paper-driven processes with electronic content and workflows, automating the end-to-end document lifecycle with capture and robotic process automation solutions from Kofax. Delta Dental has also streamlined the data-gathering and verification process for new providers and provider revalidations with RPA.

Outcome

- *Teams can access electronic documents in seconds and deliver responsive service to customers and providers*
- *Response times went from weeks to days*
- *Automation of verification data collection reduced workload and made a third temp worker unnecessary*

[Read the full story >](#)



More Real-World Results



Credit Card Price Protection: Capture extracts purchase information from customer receipts, and RPA checks retail websites to find lower prices on behalf of the consumer, issuing a refund for the difference if a lower price is found.

Automated Compliance Workflow: Capture extracts, indexes and classifies application documents, then sends identity verification information to RPA to perform Know Your Customer (KYC) checks, resulting in customer approval within minutes instead of days.

Automated Remittance Workflow: Remittance documents are sent by customers via email in various formats such as CSV, PDF, XLS, TXT, DOCX, XLSX, HTML and ZIP. RPA extracts PDF documents and routes other formats to capture, extract and transform. Information is automatically sent to the ERP and the customer is notified.

Tax Exempt Verification: A customer emails a tax-exempt certificate. Capture imports the email and extracts the body and attachment, and RPA verifies the information against third-party databases, and the customer's tax-exemption is automatically approved.

Invoice Management: RPA downloads invoices and other documents from partner portals, and Capture reads the documents, categorizes, adds to workflows and sends to employees for approval, speeding time to payment and improving relationships with vendors. RPA then integrates the documents and data with an ERP.



{Artificially} Intelligent?

Artificial intelligence (AI) is a big buzzword—the Harvard Business Review notes that “AI has generated lots of unrealistic expectations. We see business plans liberally sprinkled with references to machine learning, neural nets, and other forms of the technology, with little connection to its real capabilities.”⁷

So what’s the **right-now, real-world value of AI** in your digital transformation plans? Here are three ways artificial intelligence is transforming business processes:

1. Machine Learning: Software learns and optimizes performance via both real-time and periodic learning processes as it works. In a typical capture + robotic process automation process, machine learning and AI-based technology initially “learn” your documents via samples fed into the system. The system continues to learn over time based on document variations and updates that inevitably occur—such as bringing a new supplier into your system or learning new fields due to a form update.

2. Natural Language Processing: A type of artificial intelligence that allows software to understand and act on human language. Language is a prime example of unstructured data—just think of all the nuances in speech, translations, idioms, etc. With natural language processing, software can read or interpret those nuances and create structured data out of unstructured content, such as reading emails or chat sessions and delivering the right information in return or to another system.

3. Cognitive Automation: This type of AI leverages natural language processing, text analytics and data mining, semantic technology and machine learning to solve key business challenges like customer satisfaction, operational efficiency and compliance with more complex inputs and outputs.

“Intelligent automation systems detect and produce vast amounts of information and can automate entire processes or workflows, learning and adapting as they go.”⁶

⁶ “Intelligent Automation Entering the Business World,” Deloitte, ⁷<https://hbr.org/cover-story/2017/07/the-business-of-artificial-intelligence>

How Automated Processes Transform Your Business

| | BEFORE | AFTER |
|----------------------|---|---|
| EMPLOYEES/OPERATIONS | Low productivity | Increased productivity |
| | Manual workflows | Automated workflows |
| | Incomplete and inaccurate data | Complete and accurate data |
| | Low visibility of information and processes | Increased information and process visibility |
| | Rules applied unevenly | Rules applied systematically |
| | Questionable audit trail | Complete audit trail |
| | Not easily scalable | Easily and quickly scalable |
| CUSTOMERS | Slow processing times | Faster processing |
| | Slow customer service | Customer self-service |
| | Decreased engagement | Increased engagement |
| BUSINESS | Struggle to stay competitive | Significant competitive edge |
| | Increased operational costs | Decreased cost of ownership and increased ROI |

Summary

“Digital goes beyond technology alone to reflect a mindset that embraces constant innovation, flat decision-making and the integration of technology into all phases of the business.”⁸

The shift to digital continues, creating new challenges for organizations in managing exponentially larger amounts of information from increasing numbers of channels and formats.

To keep customer satisfaction high and operational expenses low, your challenge is in being agile enough to receive, process, integrate, and surface information quickly, accurately and comprehensively, whether from documents or electronic sources.

The secret to a digital transformation that creates seamless customer experiences? Combining **robotic process automation** and **document capture** to process and deliver information, no matter the format, to the right people and systems.

Together, these two technologies create exponentially better results for your organization, automating document- and electronic data-intensive processes, speeding service and improving the customer experience, and accelerating processes across all lines of business—resulting in a stronger bottom line for you.

⁸ PwC Global IQ Survey

Additional Resources



Learn more about the power of automation in the customer journey.

Video

Improving the Customer Journey with Digital Transformation

Webinar

Customer Experience in the Age of Robotics

eBooks

Navigating the Digital Transformation Maze: Let Mobile Capture
Take the Lead in Customer Onboarding

Streamline the Insurance Application Process & Win Policyholders



Discover why Kofax is the market leader in digital process automation.

Request a demo of Kofax RPA™ and get one free year of Kofax Capture with a “First-Year-Free KC” license.

**Power Your Processes.
Empower Your Customers.**

For more information, contact us at info@kofax.com or give us a call at +1 949.783.1333



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