

A full-body portrait of a man with short dark hair, smiling at the camera. He is wearing a dark grey suit jacket over a light blue shirt and a blue and white striped tie. His arms are crossed over his chest, and he is wearing a watch on his left wrist. The background is a light blue gradient with several faint, semi-transparent icons: a bar chart with an upward arrow, two speech bubbles, a smartphone with a gear icon, and a circular arrow with a checkmark. The overall tone is professional and positive.

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Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool collecting responses from 199 individual members of the AIIM community during the month of August 2016. Invitations to take the survey were sent via e-mail to a selection of the 193,000+ AIIM community members and through various social media outlets. Survey demographics can be found in Appendix 1.



About AIIM

AIIM has been an advocate and supporter of information professionals for over 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants.

— Bob Larrivee
Vice President and Chief Analyst
of Market Intelligence, AIIM



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Bob Larrivee is Vice President and Chief Analyst of Market Intelligence at AIIM, and an internationally recognized subject matter expert and thought leader with over thirty years of experience in the fields of information and process management. Bob is an avid techie with a focus on process improvement, and the application of advanced technologies to enhance and automate business operations.



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Introduction

Since the 1980s, we have been hearing about paper-free businesses and the drive to move toward a more digital workplace. At the time, the technology and people were not ready for this transformation. Today, the approach to digitally transform businesses has shifted from a technology first perspective to a more business centric approach, with paper-free processes becoming a focal point and opportunity for many organizations.

Yet despite widespread acceptance that reducing and removing paper is a best practice, we find that only twenty-five percent of our 2016 respondents indicate they run a clear/paper-free environment; the good news is that this figure is up from 18% in last year's report. Discouragingly, 65% of our respondents say they are still signing on paper, even though there is wide and growing acceptance of digital and eSignature technology. Despite this, and the fact that paper is still a somewhat dominant media in business, we see a 3% increase over the 2015 report, with 40% of our 2016 respondents indicating they have a number of paper-free processes and will do more in the future.

It is obvious that while interest and motivation toward a paper-free business environment is increasing, there is still a long road ahead. The human factor is still the primary reason for paper use in handling, reading, and note taking (47%). While benefits are acknowledged, and interest seems to be growing, there is still a lack of management initiatives to move away from paper (47%). Our respondents also cite a lack of understanding and awareness when it comes to paper-free options (39%), indicating a need for education on how to approach and initiate a paper-free project.

In this comprehensive report, we take an in-depth look at the amount of paper in the office, the impediments to removing it, the take up of digital mailrooms and multi-channel capture, and the increasing exploitation of mobile and cloud. Above all, we look at the progress towards paper-free processes, the triggers and decision-making processes, and the issues, benefits and ROI.

Key Findings

In General

- **Twenty-five percent of 2016 respondents indicate they run a clear/paper-free environment; up from 18% in last year's report.** 65% say they are still signing on paper.
- **Forty-three percent of respondents say paper is decreasing in their organizations somewhat (35%) or rapidly (8%).** 35% say it is stable.
- **A three percent increase is seen over the 2015 report, as forty-percent of 2016 respondents indicate they have a number of paper-free processes and will do more.** 14% say they are actively looking at every process.

Capture

- **Paper in Human Resources (HR) is decreasing in the areas of recruitment (49%) and employee lifecycle (48%).** For 41% it is decreasing in Accounts Payables (AP) and Accounts Receivables (39%).
- **The greatest paper reductions are seen in records management by 39% of our respondents, with 34% citing AP – invoice processing.** For 27% the greatest reduction is seen with technical documents.
- **The human factor is still the primary reason for paper use for handling, reading, and note taking (47%), along with a lack of management initiatives to move away from paper (47%).** Our respondents also cite a lack of understanding and awareness when it comes to paper-free options (39%).
- **Fifty-six percent of respondents are looking to automate manual processes with document classification.** For 30%, there is a move to upgrade their technology.

Inbound Content

- **The amount of paper arriving at the door is decreasing somewhat (41%) to rapidly (9%).** Digital inbound documents are increasing somewhat (47%) to rapidly (19%).
- **Demand for paperless communications is somewhat on the rise for 46% of respondents while 19% are seeing a rapid increase in demand.** Thirty-eight percent of respondents say that they now receive more digital invoices than those in paper form.

Digital Mailroom

- **Fourteen percent of respondents have a distributed, multi-channel approach across paper and digital content – up slightly over 2015.** For 29%, things are adhoc in relation to scanning, which is down slightly over 2015.
- **A hybrid approach of centralized and distributed capture is in place for 29% of respondents.** 18% cite use of centralized capture with multiple desktop scanners, and an additional 18% cite use of distributed capture at their branch offices.
- **Forty-one percent of respondents report better quality in downstream data capture and faster-post-box to in-box times equally.** For 37% there are equally fewer operational staff and faster turnaround times for customers.

Processes

- **Responsibility for radical process review falls on the line-of-business or department head according to 26% of our respondents.** It is the top-level executive who is responsible for radical process review in 22% of respondent organizations.
- **When it comes to converting key business processes, Accounts Payables (AP) is the top priority according to 30% of respondents.** For 27% it is Accounts Receivables (AR) and Records Management—cited equally.
- **Dedicated workflow/BPM capabilities are in place for 7% of our respondents – up slightly over 2015.** 36% of respondents say they have a combination of paper and digital content in the same workflows.

Triggers

- **Mandates from above are the motivating trigger for the first paper-free process according to 48% of respondents.** 35% are citing cost savings as the initial trigger for their first paper-free process.
- **When it comes to additional initiatives to eliminate paper from business processes, respondents cite regular process reviews, and cost savings equally (50%).** Improved responsiveness falls next for 42% of respondents.

Mobile

- **Mobile is seen as important and in the planning stages for 32% of our respondents.** Thirty-three percent of respondents say they support AP with mobile capture apps.
- **The most popular content to capture are images for use as records (28%).** Twenty-three percent say they use portable devices to capture documents as images only.
- **Twenty-three percent of respondents indicate they use process specific mobile apps.** Twenty-seven percent say they are using an ECM supported platform.
- **Biggest mobile capture benefit cited by 44% of respondents is the speed of data availability.** Thirty-three percent say the biggest issue is bandwidth and security equally.

Cloud

- **Forty-three percent of respondents say removal of paper from processes should be a constant objective.** Eighteen percent of respondents say they are trying to understand and strategically place cloud use.
- **When it comes to outsourced services, 40% of respondents say they plan to use more document process/data capture beyond scanning.** Fifty-four percent of respondents envision more of a hybrid cloud and on-premise deployment.

Opinions and Spend

- **Fifty percent of respondents say they will spend more on workflow and BPM.** Forty percent of respondents plan to spend more on electronic forms and data capture applications.
- **When it comes to purchasing preferences, 48% will turn towards a vendor direct purchase.** Sixteen percent of respondents will turn to a Systems Integrator or Value Added Reseller (15%).
- **Key lessons learned are having executive level buy-in (42%) and stakeholder involvement (33%).** Key benefits identified are faster customer response (50%), and staff reductions with higher productivity (42%).
- **Measurements used by our respondents are benefits to the business (46%), and process cycle times (36%).** Payback is possible within 3 months according to 9% of respondents, while 36% indicate payback between 3 and 6 months.



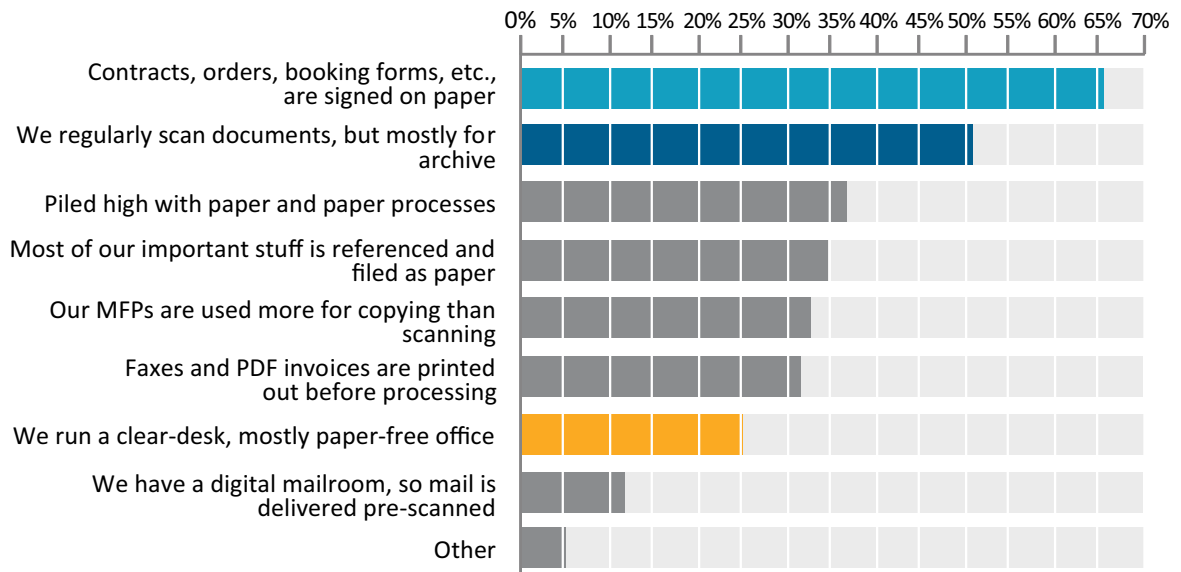
In General

Society today would have us believe in the minimalist approach to business operations: everything we need is online, and our business world is a pristine place devoid of paper, with everything available in digital form. In this scenario, the workforce can be local or remote, and remain fully engaged in their daily business activities, digitally.

The reality for many is that paper still has a stranglehold on their day-to-day activities. For example, most of the processes they are tasked with—like review and approval—still require physical interactions with paper-based information. When we asked our respondents to describe their office or organization, 65% say they are still signing contracts, booking forms, and more on paper, with 51% indicating they regularly scan documents but only to archive.

While the numbers are up slightly to 25% of respondents who say they run a clear desk, mostly paper-free office, it is still disheartening after all of these years to find that more organizations are not readily taking advantage of managing digitally born or created information entirely in digital form. (Figure 1) There is clearly room and opportunity for business organizations to maximize their information use and value as well as lower operating costs by removing paper from their business processes.

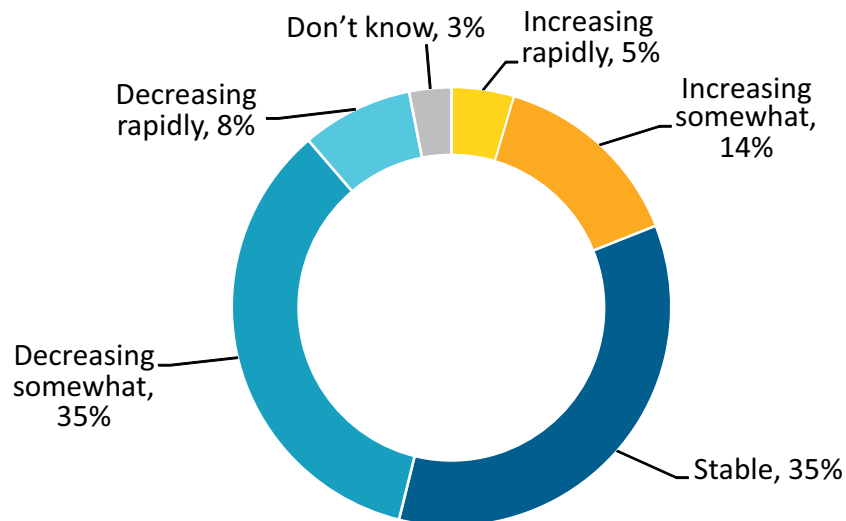
Figure 1: Which of the following would describe your office or typical offices in your organization?



Paper use for signing is not the only driver of paper consumption. As we saw, it is the human factor and the need to hold something physically for reading, note taking, etc. that is also driving paper consumption in business organizations. Printers, yes, are being used to generate a paper copy, but let us not forget photocopying as well, allowing the information to be shared with others, in non-digital format.

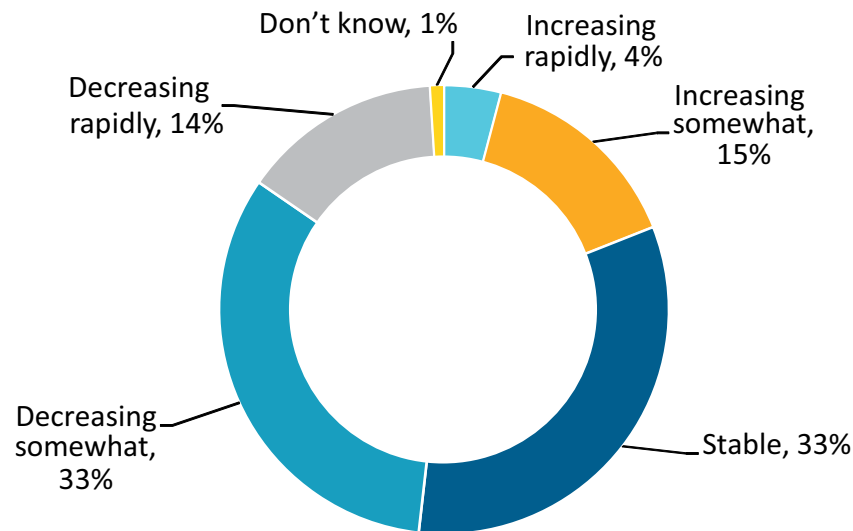
This led us to ask about paper consumption overall. Our respondents indicate that paper is decreasing in their organizations somewhat (35%) or rapidly (8%), while 35% say it is holding stable. (Figure 2)

Figure 2: Would you say that the consumption of paper and/or number of photocopies in your organization is:



This brings to mind the question of necessity over organizational resistance and how the business operates. If paper is being generated for both personal use and reasons of sharing, what impact is it having on operational processes as a whole? Looking deeper into the impact of paper flowing through process, we find that for 33% of our respondents paper flow is somewhat decreasing while 14% indicate it is decreasing rapidly. Only 4% indicate a rapid increase in paper flow through their processes. (Figure 3) The question here should be one of why the increase exists, and how do you curb this to prevent potential risk and operational disruptions in the future?

Figure 3: In general, would you say that the amount of paper flowing through your business processes is increasing or decreasing?

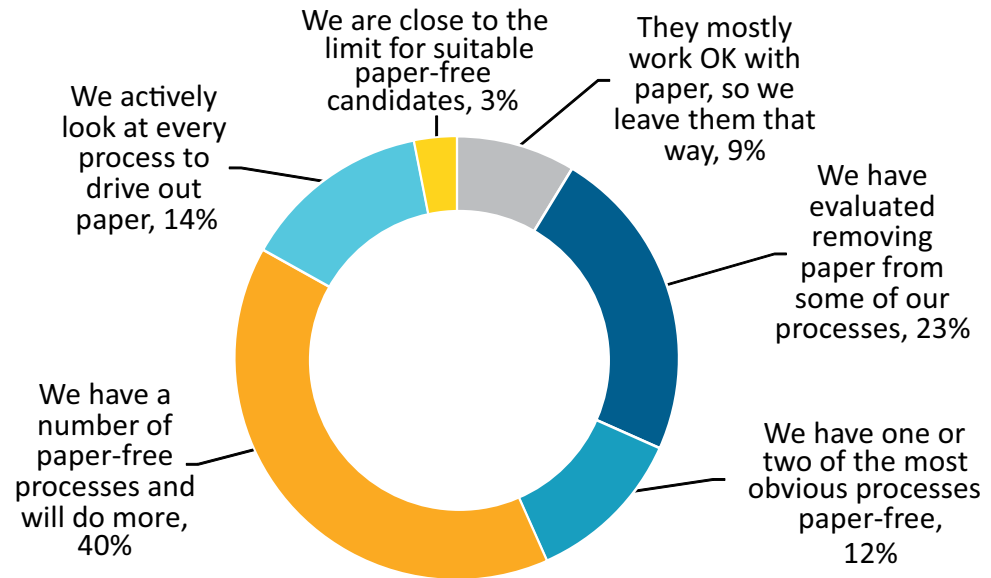


"Paper flow through business processes is on the decrease for many organizations. For those who find it increasing, now is the time to investigate the opportunity to eliminate paper from their processes before it presents an operational risk and issue."

For some organizations (40%) there are a number of paper-free processes already in place and they are looking to do more, with 14% of our respondents saying they are actively looking at every process for ways to eliminate or at least minimize paper use. A small group (3%), indicate they are close to reaching their limit of paper-free process candidates. (Figure 4) This could be interpreted as they are really good at eliminating paper and truly are paper-free, or that they have run out of ways to assess and identify new opportunities.

In either case, these projects should be seen as a foundation for further improvement, and even though there may in fact be a diminished number of candidates remaining, there is always opportunity to further improve upon those that have been transformed. As an example, there may be opportunity to capture information earlier in a process and closer to its first touch point.

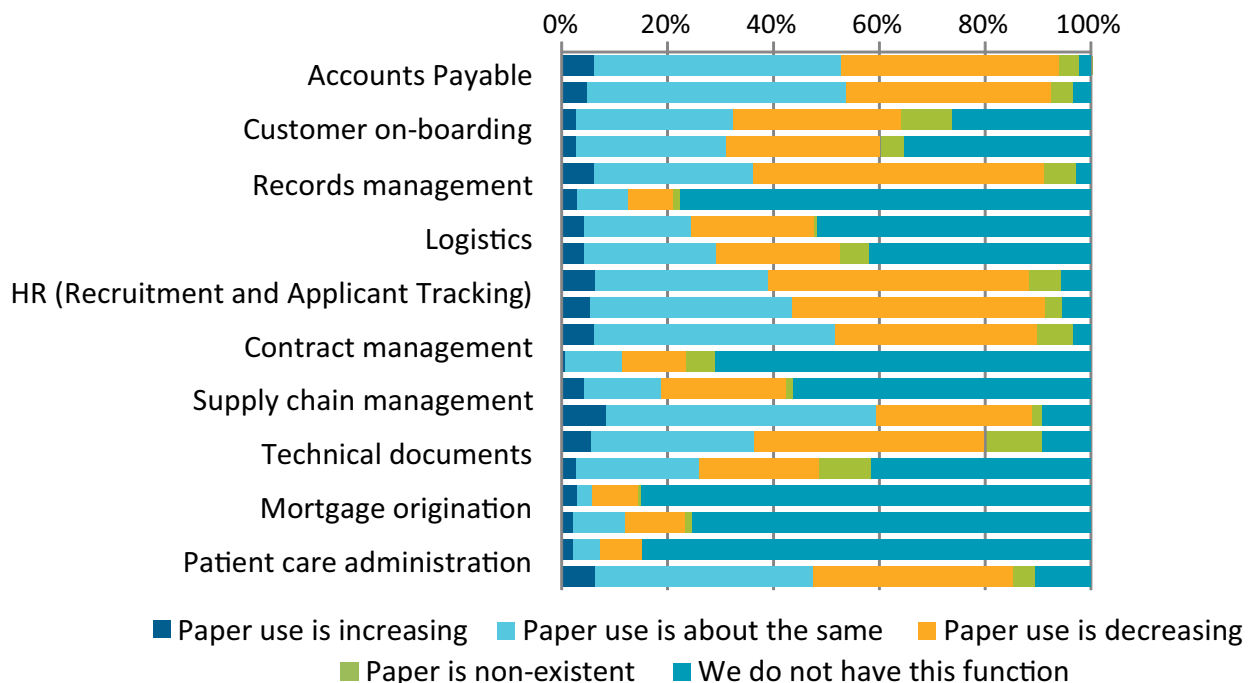
Figure 4: How would you describe progress towards eliminating paper from your business processes?



Capture

So this turns our focus to identifying where paper is increasing, the related processes, and opportunities to remove it from the process in lieu of its digital counterpart. When looking at where paper is most prevalent and seen as increasing, our respondents cite the legal department (8%) and contract management (6%) as those growing the most. Areas showing the biggest decreases in paper use are Accounts Payables (AP) cited by 41% of respondents, and Accounts Receivables (AR) cited by 39%. Even bigger reductions are seen in the Human Resources (HR) processes of recruitment (49%) and employee lifecycle (48%). (Figure 5)

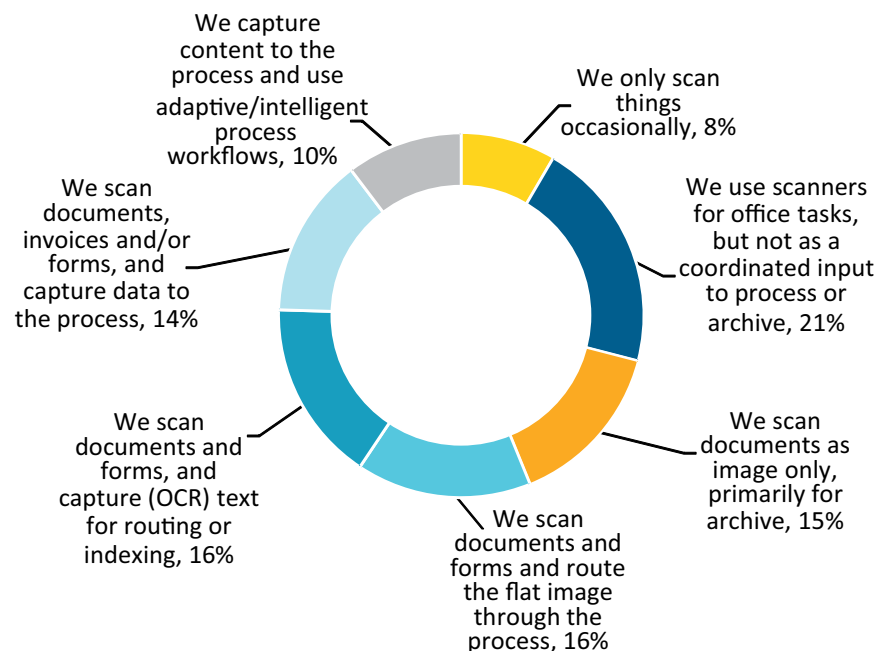
Figure 5: In which of the following processes is paper increasing?



So why exactly does paper still exist in so many organizations? We stated earlier, people like to have paper to read, take notes, and even share. There is a lack of comfort in the digital forms, and while this could be generational, it is more likely cultural in relation to the organization itself. Leadership must take the leading role in moving their organizations forward. There should be a clear vision as to why paper-free is beneficial, and the options available from capture to disposal.

Capture is one of the most important elements as it brings the information into the information ecosystem, placing under proper control, making it accessible and available for action. So it seems this would be a prime focal point for many organizations, yet when we asked about capture, only 10% of respondents indicate they capture to process and use adaptive and intelligent process workflows. For 21%, scanners are used for general office tasks, but not in a coordinated effort. (Figure 6)

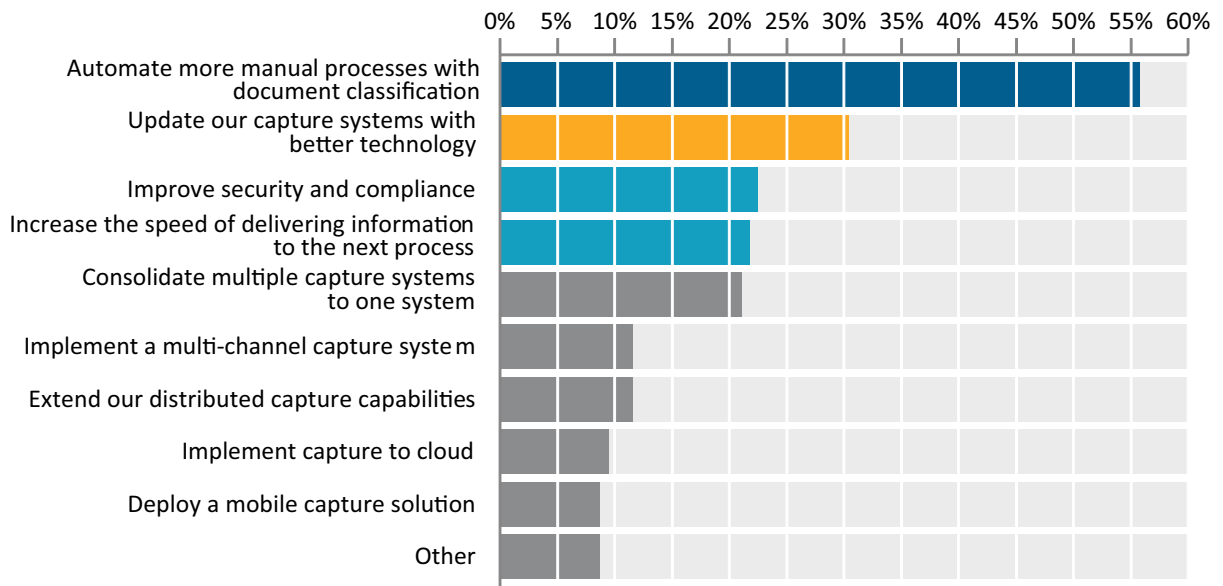
Figure 6: How would you describe the highest level of capture maturity in your business unit (across in-house and outsource)?



Since capture is an essential part of being paper-free, and given there should be a focus on the capture process, we asked about priorities in relation to improving capture. We were told by 56% of our respondents that they want to automate manual processes with document classification. For 30% their priority is to upgrade their current technology, and 22% want to improve their security, compliance and information delivery speeds. (Figure 7)

All of these points to a desire for capture practices that will provide levels of consistency, support security and compliance requirements, and improve operational efficiencies through the capture process. Getting the information to the right people, at the right time, securely and accurately.

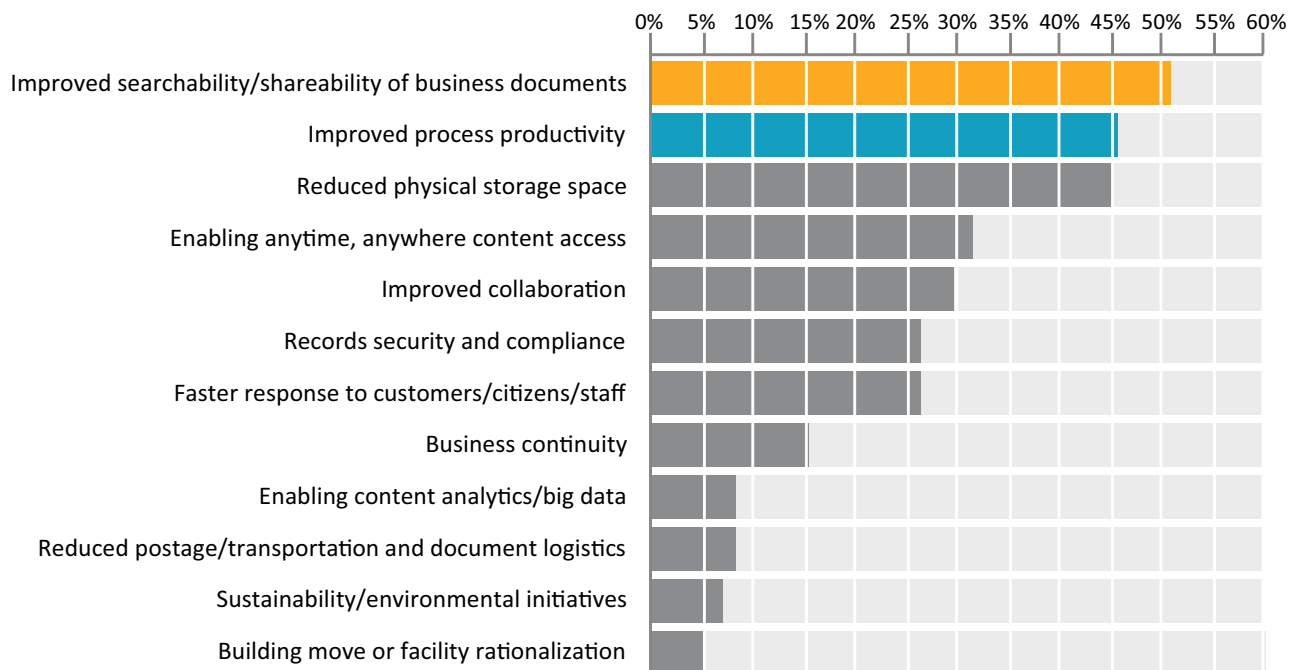
Figure 7: What are your immediate priorities to improve your current capture system(s)?



A focused approach to capture is essential to getting the information to the right people, at the right time, securely and accurately.

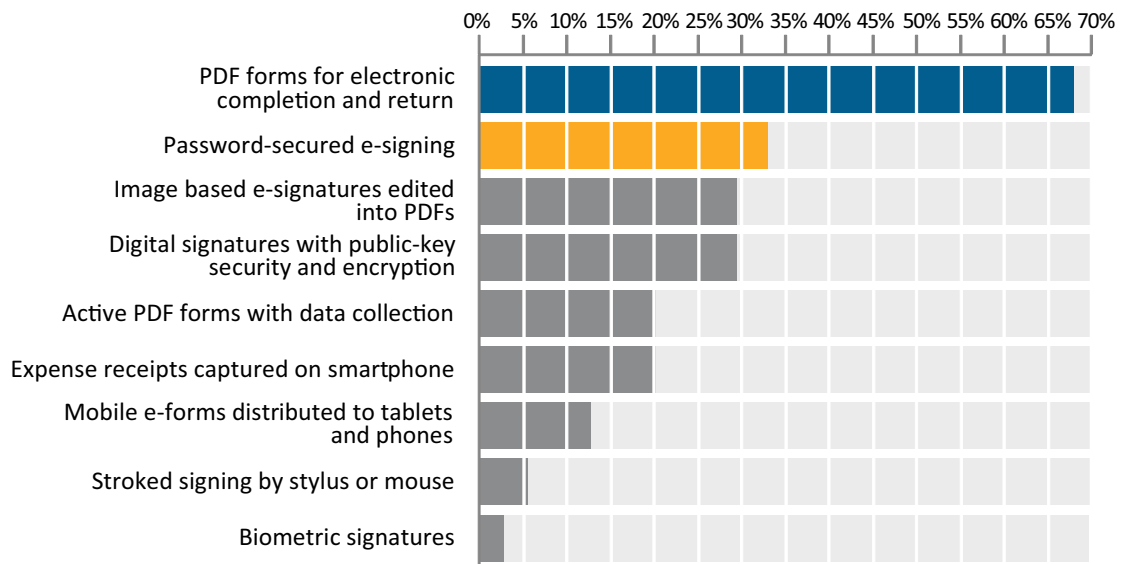
As with any initiative, there must be a driver, something that is moving an organization to adapt and adopt new ways-of-working. When it comes to scanning and data capture in an organization, 51% of our respondents say they want improved searchability and shareability using digital information. Improved productivity ranks second with 46% indicating this is their biggest driver, and not surprising in the top three, 45% say their biggest driver is to reduce physical storage space and their associated costs. (Figure 8)

Figure 8: What would you say are the three biggest drivers for scanning and data capture in your organization?



There was a time, not so long ago, when storage cost reduction was the mantra associated with scanning and capture. Today, we hear references to operational efficiency, improved productivity, and findability. It is also common to hear discussions on the use of electronic forms, and electronic or digital signatures in relation to capturing data in a digital form at first touch point, and keeping it that way. When asked about the use of these in their organizations, 68% of respondents indicate the use of PDF forms for electronic completion, and 33% are using password secured e-signing, reflecting a growing acknowledgement that paper-free is a better approach, and a greater understanding of how and where various technologies apply. (Figure 9)

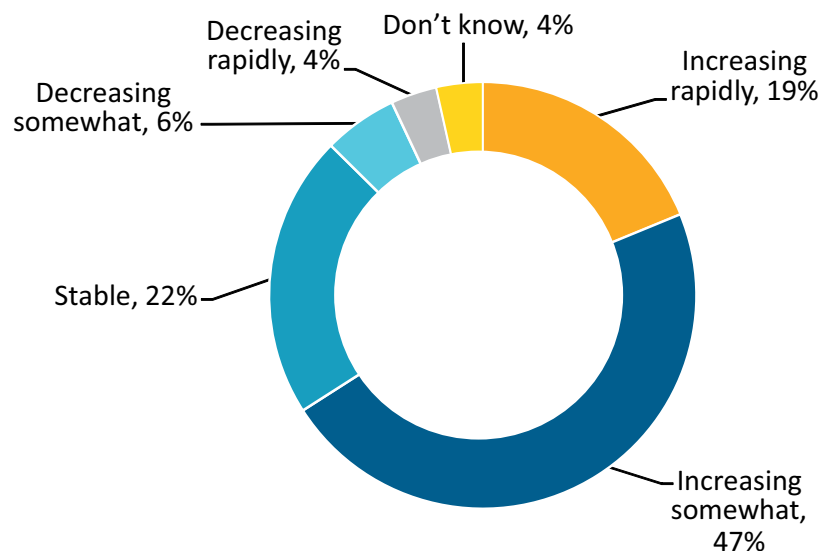
Figure 9: Do you use any of the following for forms and signatures?



Inbound

So we've seen how organizations are dealing with scanning and data capture in these forms, but what about multi-channel inbound content? What is happening there? Our first question is about paper coming into the organization, is it increasing or decreasing? For 41% of our respondents, it is decreasing somewhat, and for 9% it is decreasing rapidly. Next we turn our attention to inbound digital and found that for 47% of respondents it is increasing somewhat, and 19% say it is increasing rapidly. (Figure 10)

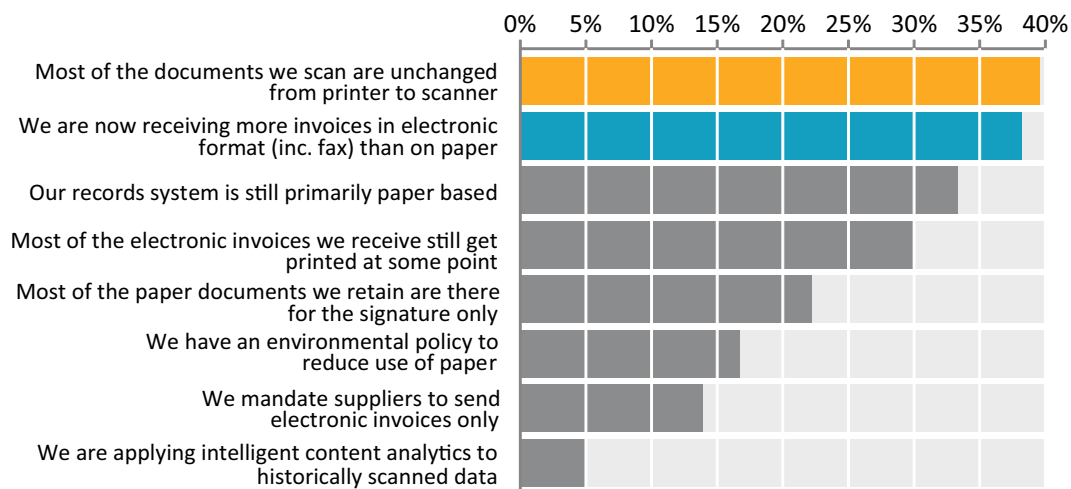
Figure 10: Would you say the amount of inbound digital documents (i.e. not being scanned) is increasing or decreasing?



Taking this into consideration, we look at customer demand for digital over paper communications, and find that 46% of respondents say demand is increasing somewhat, while 19% say it is increasing rapidly. So demand to provide paperless communications is increasing, inbound digital content — not scanned — is increasing, and paper arriving at the door is also decreasing indicating it is all moving in the right direction.

Digging deeper to look at what is happening internally, we find that when it comes to materials being printed and then scanned, according to 40% of our respondents, there are no changes in between processes. In other words, what is printed is intact when it gets scanned, begging the age-old question, “Why print it to begin with?” We also find that inbound digital invoices are more dominant than paper invoices for 38% of respondents, allowing this information to be brought into a process more effectively and staged for processing sooner. From a records standpoint, many are still primarily paper-based. (Figure 11)

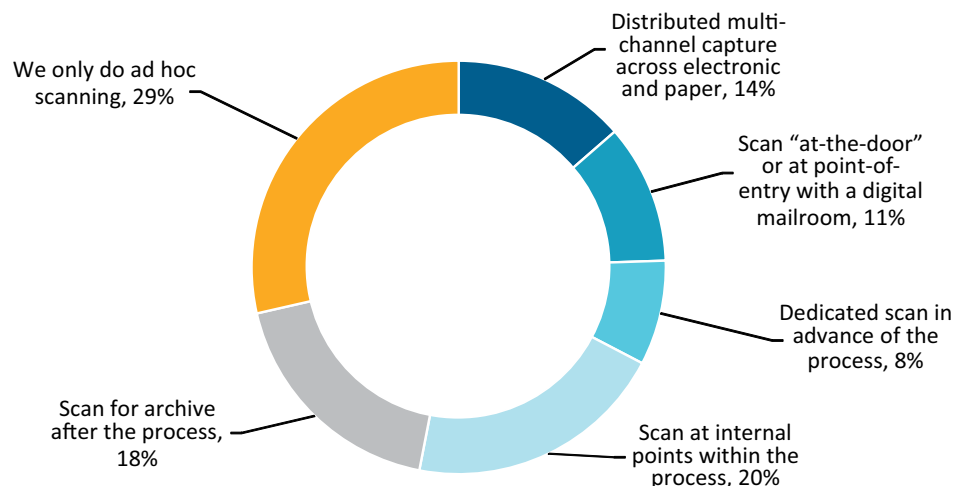
Figure 11: In general, which of the following apply in your business unit?



Digital Mailroom

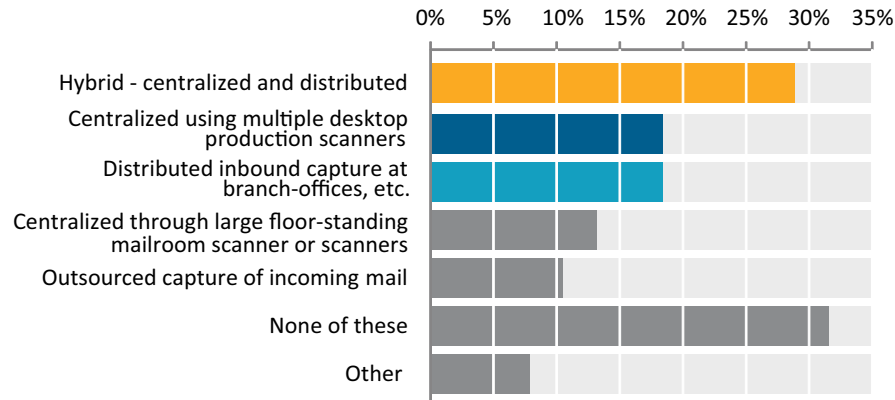
As we see, while inbound paper is decreasing and inbound digital increases, there is a growing need to address how inbound content and documents will be addressed across the enterprise and across the various formats. While 29% of respondents say they only do adhoc scanning, 14% indicate they partake in a distributed, multi-channel approach across both digital and paper-based content. (Figure 12)

Figure 12: Which of the following best describes how you mostly deal with inbound documents and forms in your business unit (in-house or outsourced)?



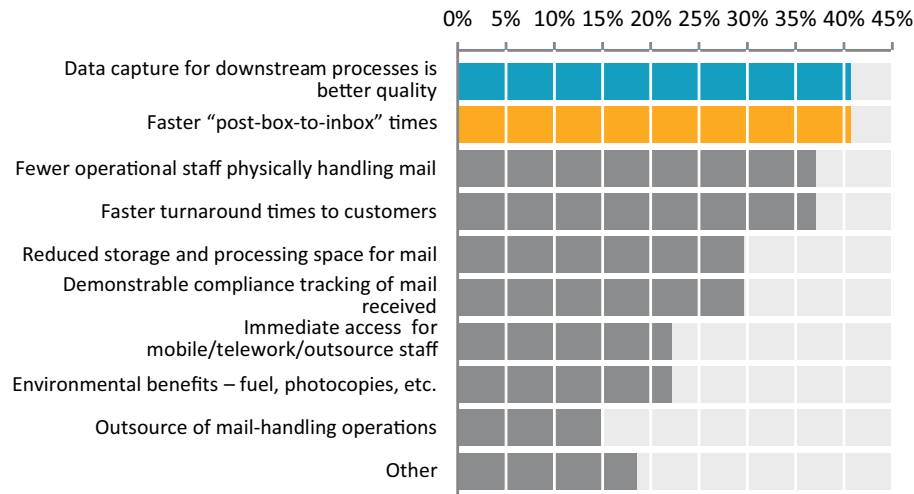
This now leads us to a discussion on the use of digital mailrooms and how organizations view and use this scenario in their operations. As with other technology sets, the use of hybrid comes into play here as well with 29% of our respondents indicating they use a hybrid approach combining centralized and distributed capture. For 18% of respondents, it is an equal split between centralized using multiple desktop scanners, and distributed capture at their branch offices. (Figure 13)

Figure 13: Which of the following “digital mailroom” scenarios do you use?



The benefits of a digital mailroom are realized in many ways, ranging from better quality in downstream data capture as cited by 41% of our respondents, to faster post-box to in-box as stated by 41%. The benefits do not end here, 37% of our respondents say they are now running with fewer operational staff and experiencing faster turnaround times to customers, indicating more effective and efficient operational processes. (Figure 14)

Figure 14: Which aspects of digital mailrooms are proving the most beneficial?



Digital mailrooms are seen as beneficial not only for data capture, but improved operational efficiencies and effectiveness.

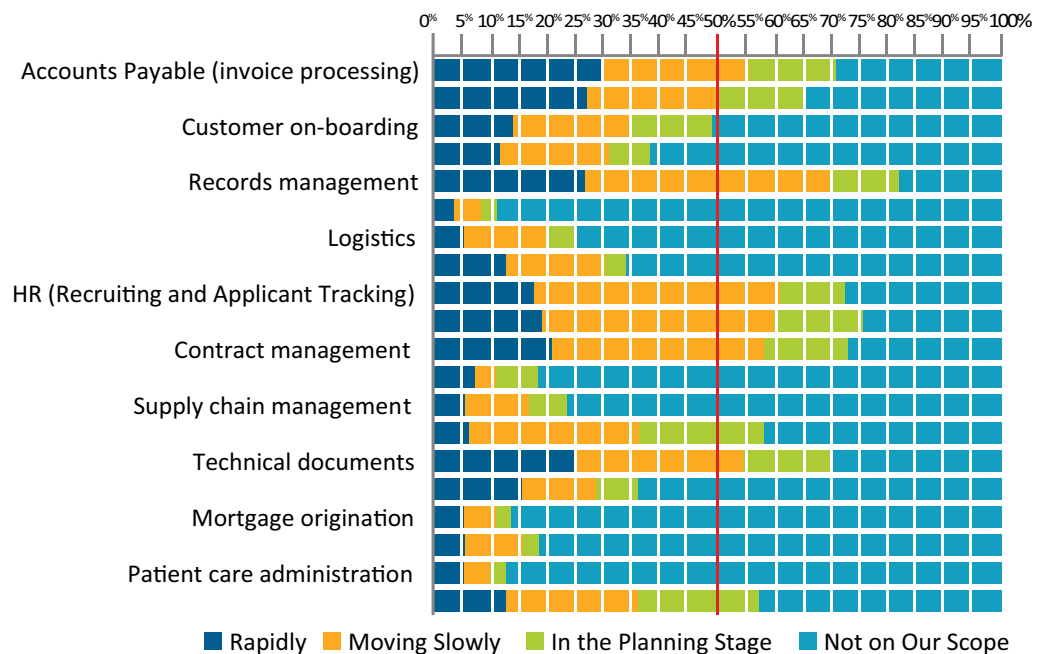


Processes

A well planned and maintained paper-free or nearly paper-free environment requires leadership and changes in process – or the ways-of-working with business information. Someone must be responsible for the business processes, and have the decision-making authority to change as needed. In 26% of the organizations that responded, this responsibility falls on the line-of-business manager or department head. For 22%, it is the top board level making the decision and deemed responsible.

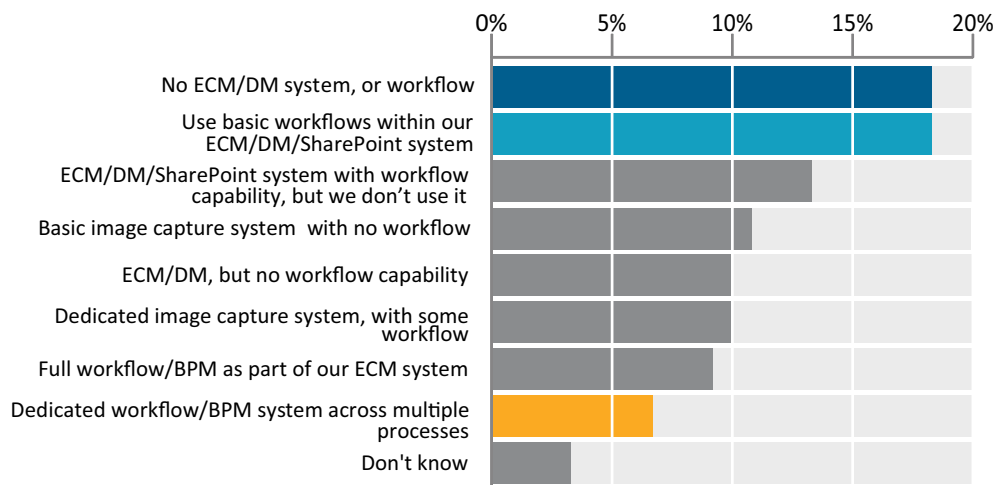
Knowing this, the next question is where is their focus? According to 30% of our respondents, Accounts Payables is the fastest growing area. Additionally, 27% of our respondents indicate that Accounts Receivables and Records Management are growing at an equal rate of conversion to be paper-free. (Figure 15)

Figure 15: At what rate (or planned rate) are you converting key processes to paper-free?



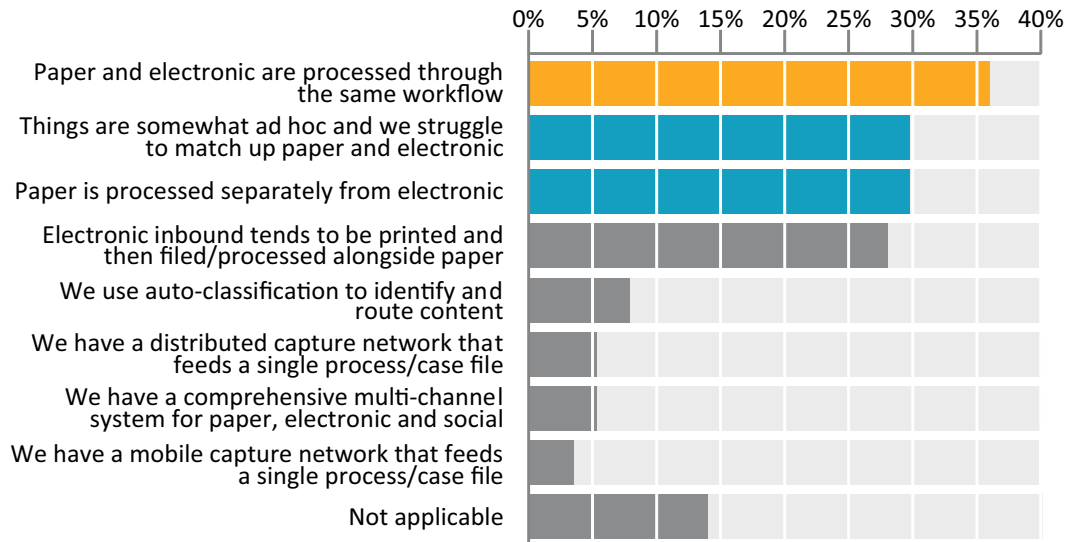
This leads us to further investigate the current levels of BPM capabilities being used in relation to paper-free processes within the organization. Of those who responded, 18% say they have no ECM, document management, or workflow in place. Use of the basic capabilities found in ECM, document management, and SharePoint are in place for 18%, while 7% say they have a dedicated workflow system across multiple processes. (Figure 16)

Figure 16: How would you describe the level of workflow/BPM capability that you have for paper-free processes?



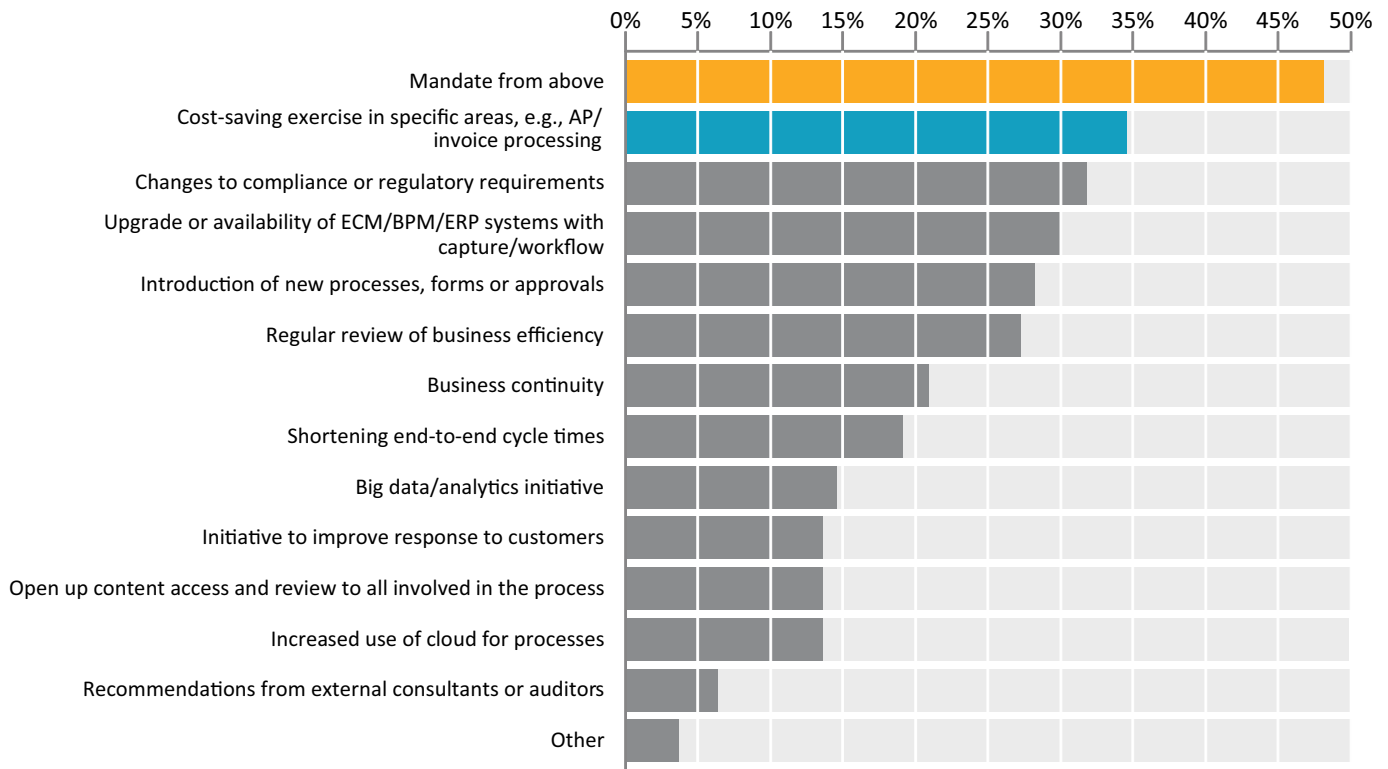
The question now reverts back to one of how multi-channel inbound content is being managed from a workflow perspective. While 30% of respondents say it is adhoc with paper being processed separately, 36% indicate they use a blended approach with paper and digital in the same workflows. (Figure 17) While some is better than none, working with mixed media creates challenges in consistency, and matching up the information quickly and accurately.

Figure 17: How do you deal with multi-channel inbound content?



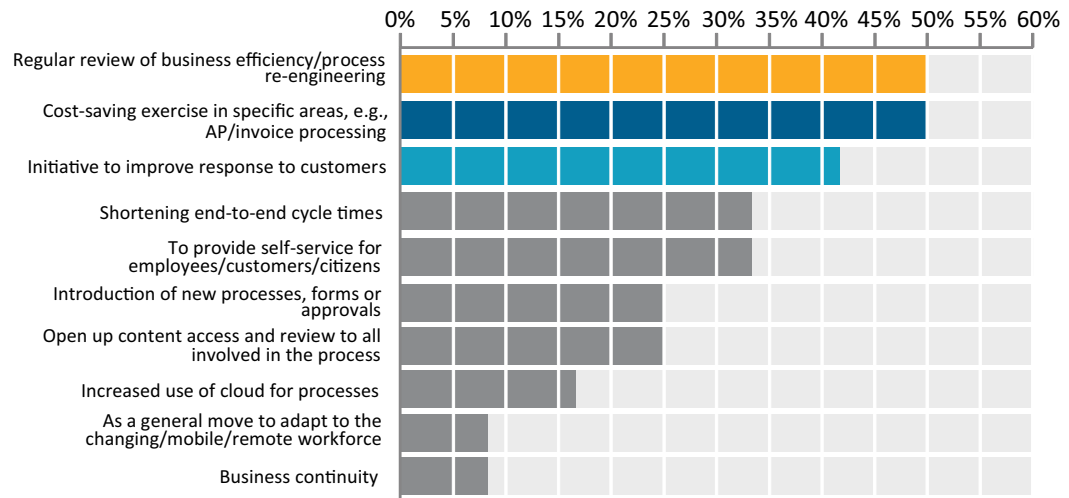
The question we must now ask is what triggers movement to a paper-free environment? We know that taking the first step can be a difficult one when it comes to motivating the user community, selecting a target process, and even how to begin a project. When we posed this question to our audience, 48% of our respondents said it was mandates from above that were their initial trigger for their first project, with cost savings cited by 35% as the trigger for their first initiative. (Figure 18)

Figure 18: What would be the trigger(s) to set you off on your first paper-free process implementation?



To those who had already moved in a paper reduced direction, we asked about the top three triggers to keep the momentum going and look for more opportunities to eliminate paper from their processes. Our results show an equal balance where 50% of our respondents cite regular process reviews and cost savings as the top triggers for them, while 42% are looking to improve responsiveness. (Figure 19) The indication here being one of realized benefits with a desire to further the gains of being paper-free.

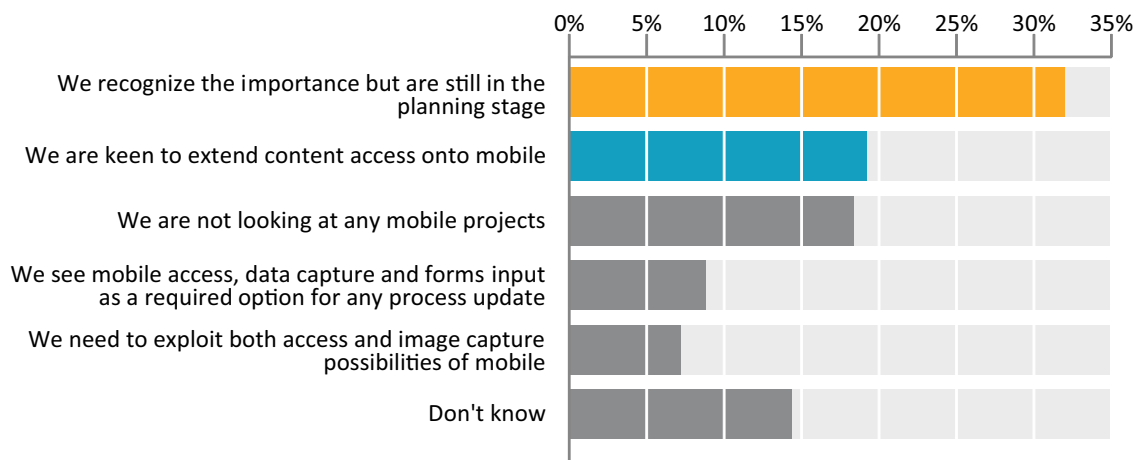
Figure 19: What are the strongest triggers in your organization for converting more processes to paper-free?



Mobile

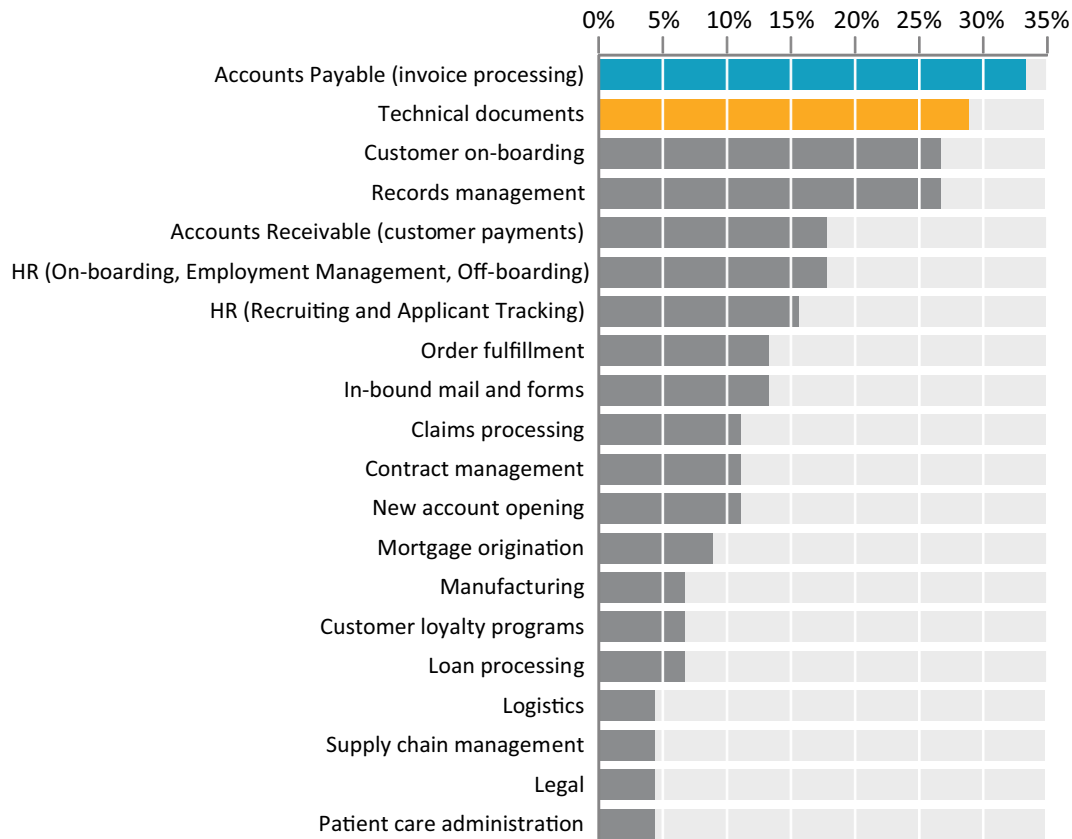
Paper reduction or being paper-free in your business operations not only reduces the expense of maintaining the paper, it also opens up the ability to better engage remote workers, partners, suppliers, clients, and anyone you need to conduct business with, digitally. As the workforce becomes more mobile, there is a growing need to improve content access, data capture at first touch point, user engagement, and process interaction. As such, 32% of our respondents indicate they see the importance of mobile and are planning for it accordingly. Additionally, 19% of those who have mobile capabilities in place are looking to extend mobile beyond its current state. (Figure 20)

Figure 20: How are you looking at mobile devices for content access and data capture?



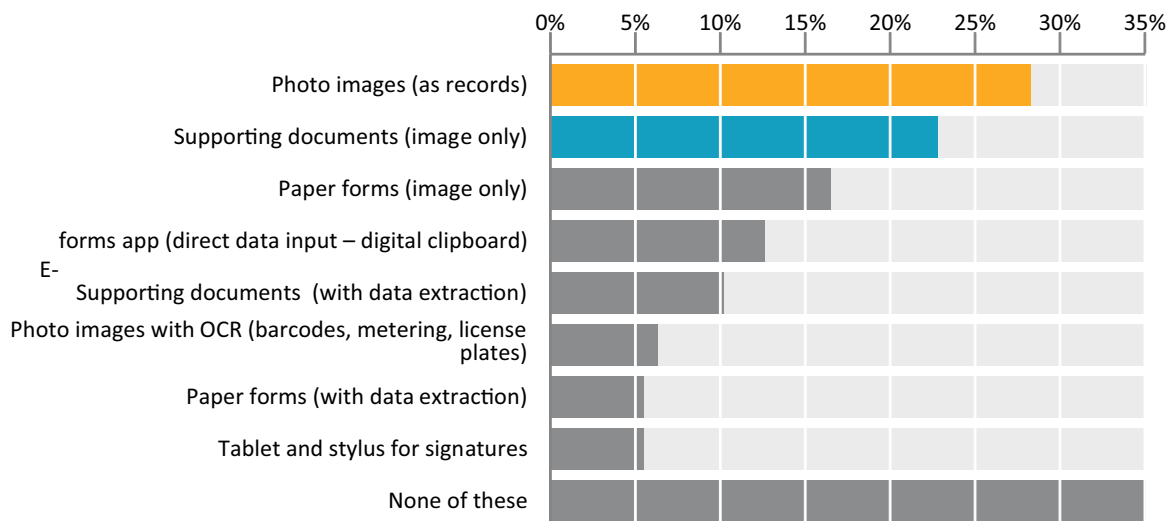
Looking further, delved more specifically into those processes where mobile capture is currently being supported. For thirty-three percent of our respondents, Accounts Payables (AP) are the area of focus and interestingly, for 29% it is processes related to technical documents. (Figure 21)

Figure 21: What business processes do you currently support with a mobile capture application?



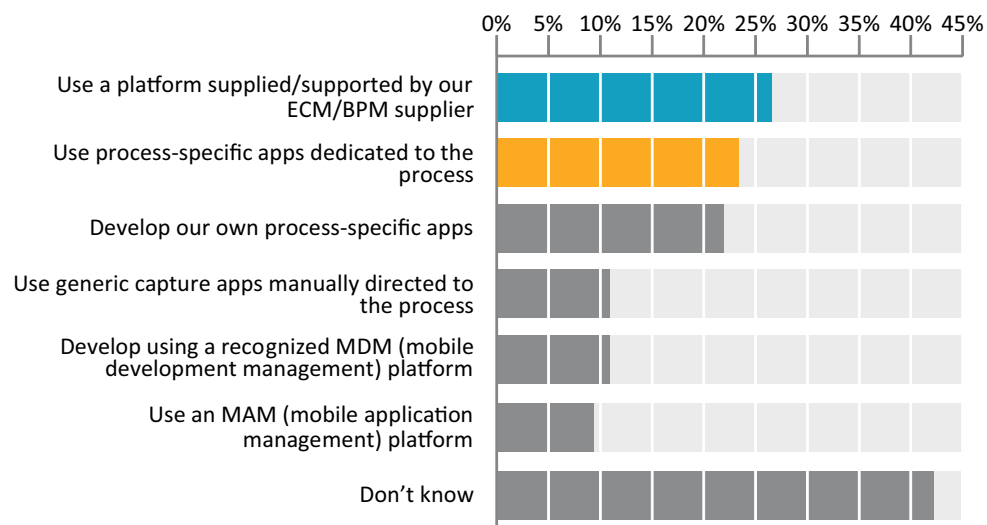
Our attention now turns to the types of information being captured using mobile devices. Is it everything or only specific content? Are the content elements being captured digital or physical? According to 28% of our respondents, they use mobile devices to capture photos and images, while 23% say they capture supporting documents as images only. So capture is taking place, but primarily to capture images of content. To a much lesser degree, mobile devices are not as widely used for signature capture, and forms using data extraction, both of which are ideal for mobile capture and could yield significant benefits. (Figure 22)

Figure 22: Do employees/field staff in your business unit currently use portable devices (portable scanners, smartphones, tablets) for any of the following?



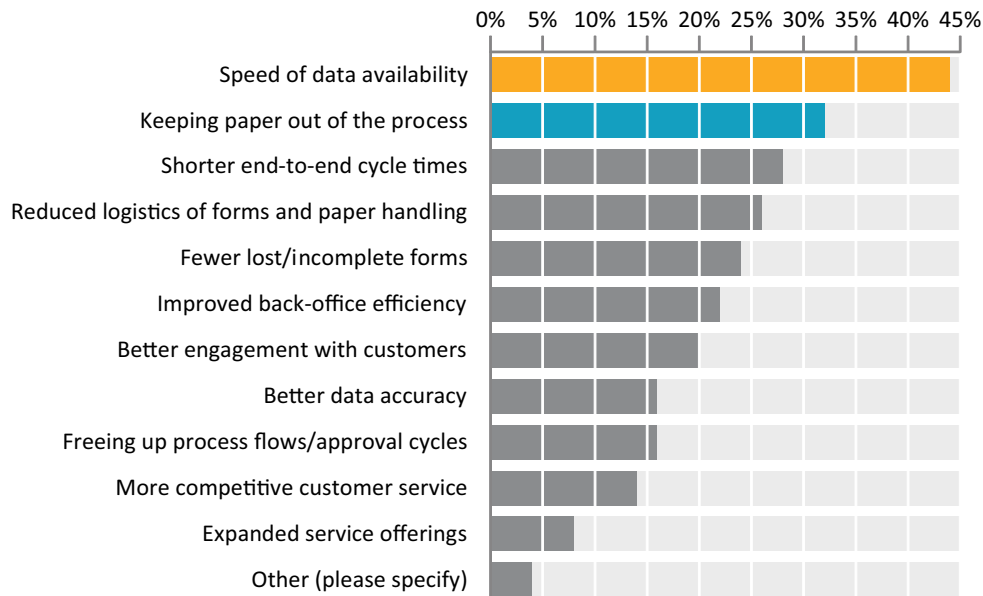
Given the level of opportunity to streamline operations through paper reduction, one has to look at how this is being addressed. What approaches and considerations are given to mobile capture projects and the related technologies available? Is it a case of using best-of-breed type products, or perhaps a platform of some sorts? According to our respondents, 27% are using a platform supplied and supported by their ECM/BPM suppliers, leveraging the inherent capabilities of products they have chosen. For 23% of our respondents, process specific apps are in play that are dedicated to a specific process indicating the potential of finely tuned capabilities—targeting, say, AP and other specific line-of-business processes. (Figure 23)

Figure 23. Which of the following approaches are you taking for your mobile capture projects?



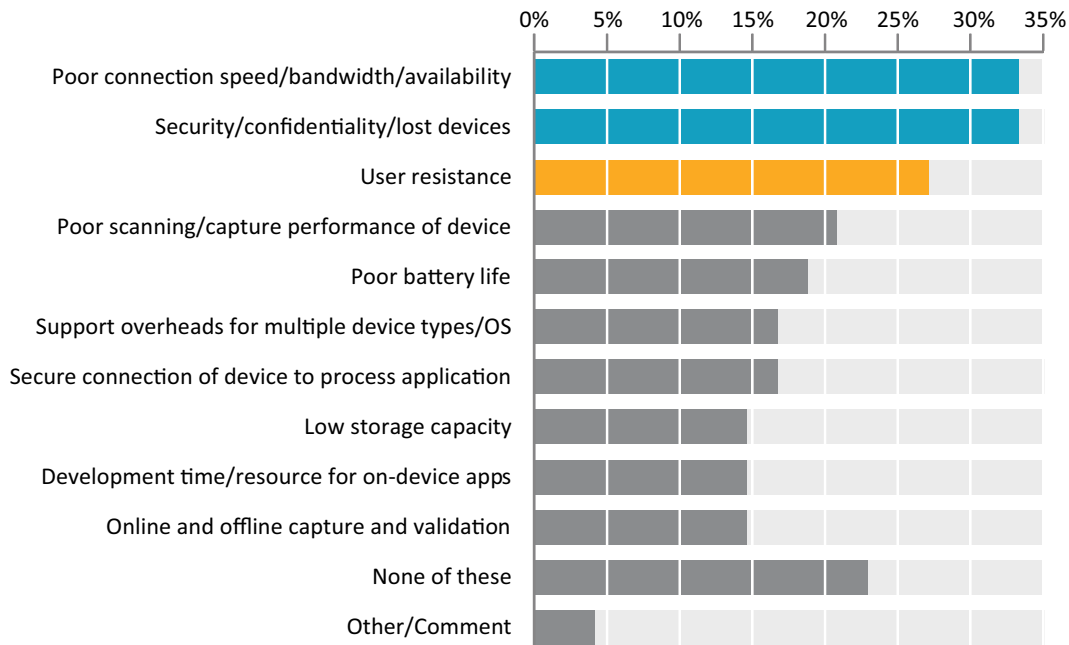
We know that there is benefit to be gained by improving and automating business processes, and by extending capture and access capabilities beyond corporate walls to the remote workforce. So what benefits have been gained here as a result of extending mobile capture capabilities? According to our respondents, speed of data availability (44%), keeping paper out of processes (32%), and shorter end-to-end cycle times (28%) top the list. (Figure 24)

Figure 24: What have been the three biggest benefits of your mobile/portable capture projects?



No project runs flawlessly, without issues arising. When we probed into some of the challenges related to mobile capture projects, 33% cited poor connections, bandwidth, and availability along with security concerns, especially as they relate to lost or stolen devices. For 27% of our respondents, somewhat surprisingly, user reluctance sits high on the list. (Figure 25) It has always been interesting that when it comes to technology use, personal acceptance and use seem to come readily while the same technologies - when placed in business - seem to suddenly become an issue.

Figure 25: What issues have you encountered with your mobile/portable capture projects?



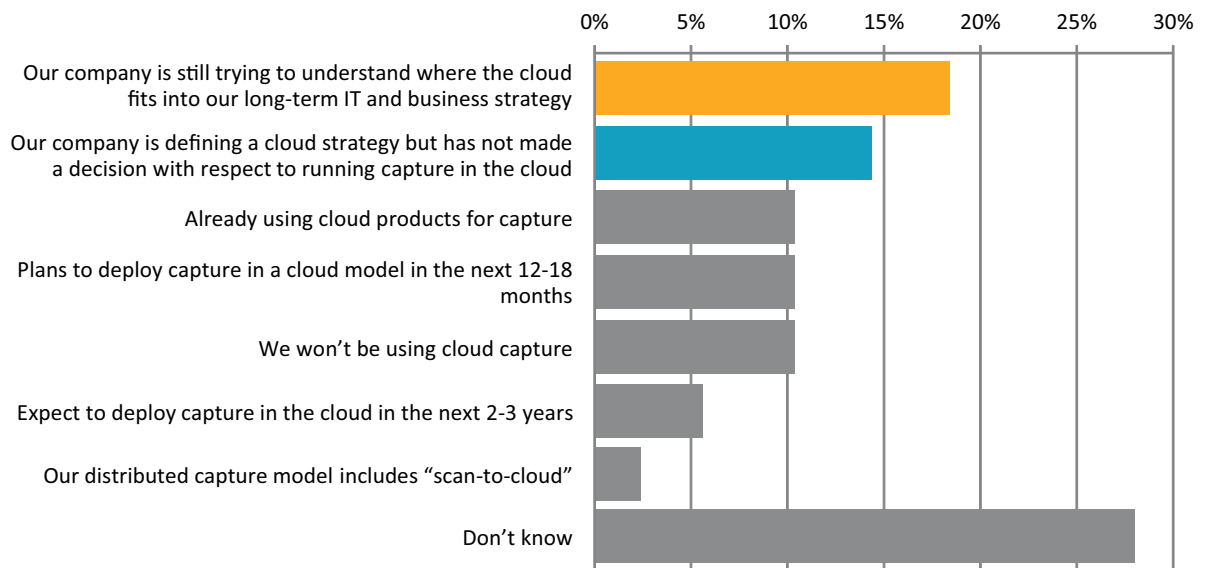
Ironically, when it comes to technology use, personal acceptance and use seem to come readily while the same technologies - when placed in business - seem to suddenly become an issue.



Cloud Perceptions

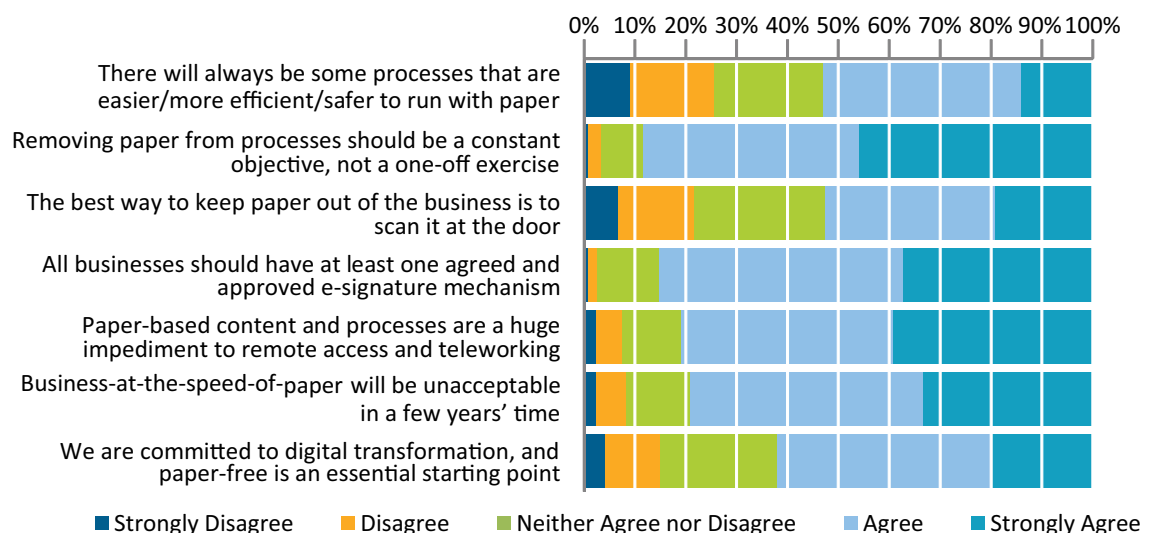
It is near impossible today, to discuss mobile content, and not discuss cloud. Cloud has become a major discussion point relating to access and user engagement in a device agnostic way. As such, we delve into the use or planned use of cloud in relation to paper reduction and paper-free processes. When it comes to a cloud strategy, 18% of those who responded say they are trying understanding and strategically placing cloud into their framework, while 14% are actively defining a strategy. Just over 10% indicate they are currently using cloud for capture or plan to within the next twelve to eighteen months. (Figure 26)

Figure 26: What is your strategy for cloud deployment of capture?



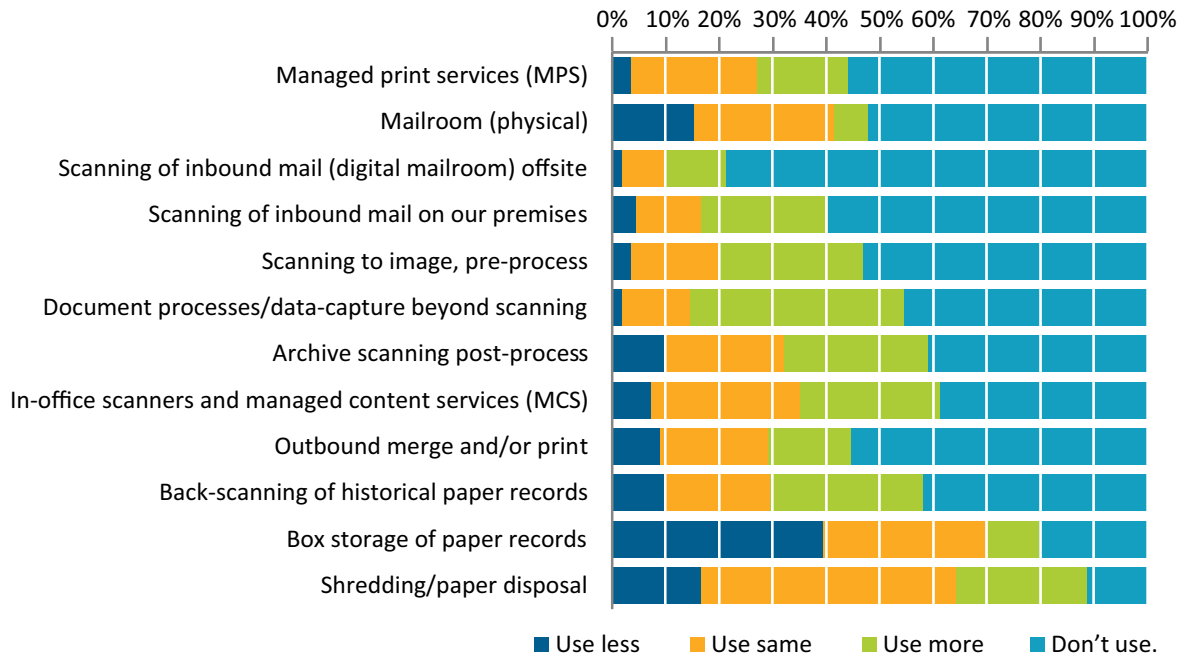
Extending this conversation to perceptions of why this might be a good use of cloud in relation to moving in a more paper-free direction, 43% of our respondents feel that removal of paper from processes should be a constant objective rather than a onetime project, and 46% feel that business at the speed of paper in today's business world is simply unacceptable. (Figure 27) Paper clogged processes slow business transactions, which by today's standards diminishes competitive advantage and ability to be more responsive to customer demand.

Figure 27: How do you feel about the following statements?



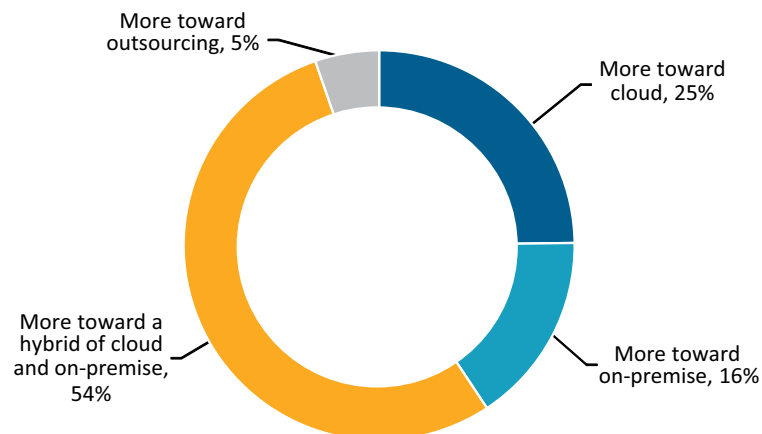
This is one aspect of cloud. There is another that is related to outsourcing and using third party services to capture information. When asked about plans for outsourcing, 40% of our respondents indicate to use more outsourced data processes and data capture beyond scanning, while 29% say they will be doing more back-scanning of historical documents. (Figure 28)

Figure 28: What use do you make of outsourced document services and what are your plans?



Keeping this in mind, the next element to investigate is one of deployment. According to 54% of our respondents, use of a hybrid model comprised both cloud and on-premise is the preferred method, while 25% are leaning more heavily toward a cloud only approach. (Figure 29)

Figure 29: How do you view your delivery/deployment methods within the next two years?

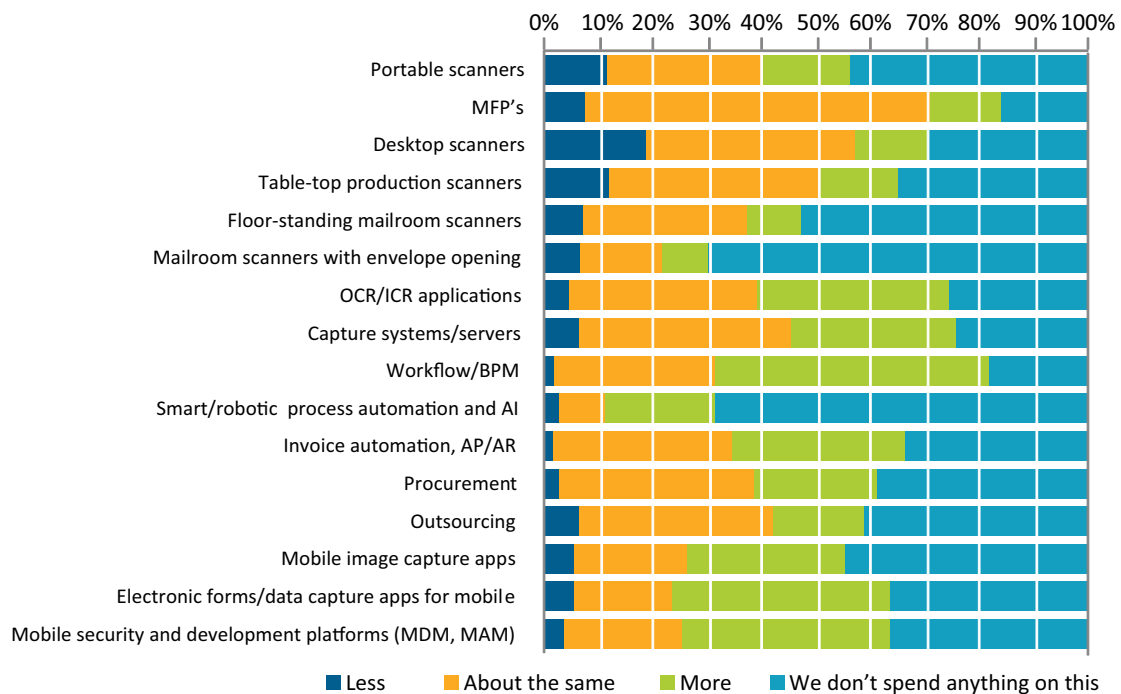




Opinions and Spend

As with all projects, there is an element of vetting the technologies and suppliers of choice. There are also costs associated with each of the technologies, and this is where we now focus our attention. When asked where they think spending will occur and how it compares to that of the past twelve months, 50% of our respondents say there is a plan to spend more in workflow and BPM, with 40% citing an increase on electronic forms and mobile data capture apps, reinforcing a direction to capture information earlier in the process to increase efficiency and access. (Figure 30)

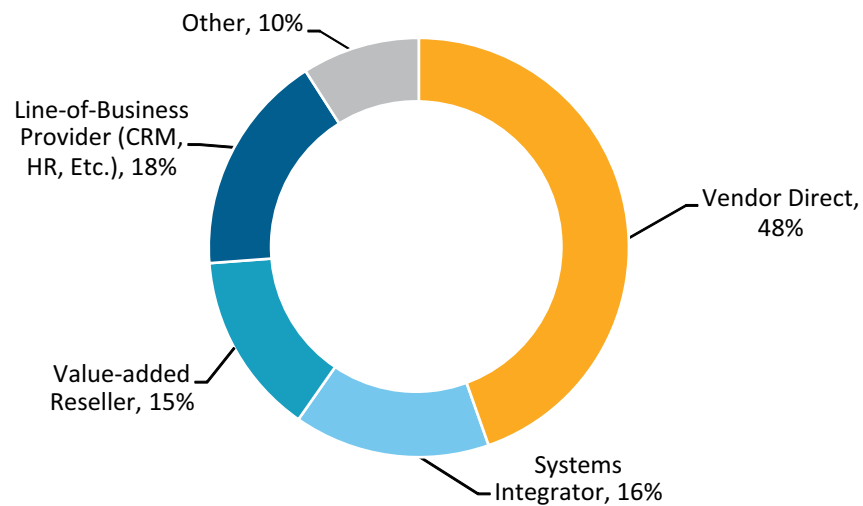
Figure 30: How do you think your organization's spending on the following products and applications in the next 12 months will compare with what was actually spent in the last 12 months (ignoring small increases in support costs)?



The focus is on process improvement with indications that increased spending is planned for workflow, BPM, electronic forms, and mobile capture apps, enabling information to be more readily captured and accessible from first touch point.

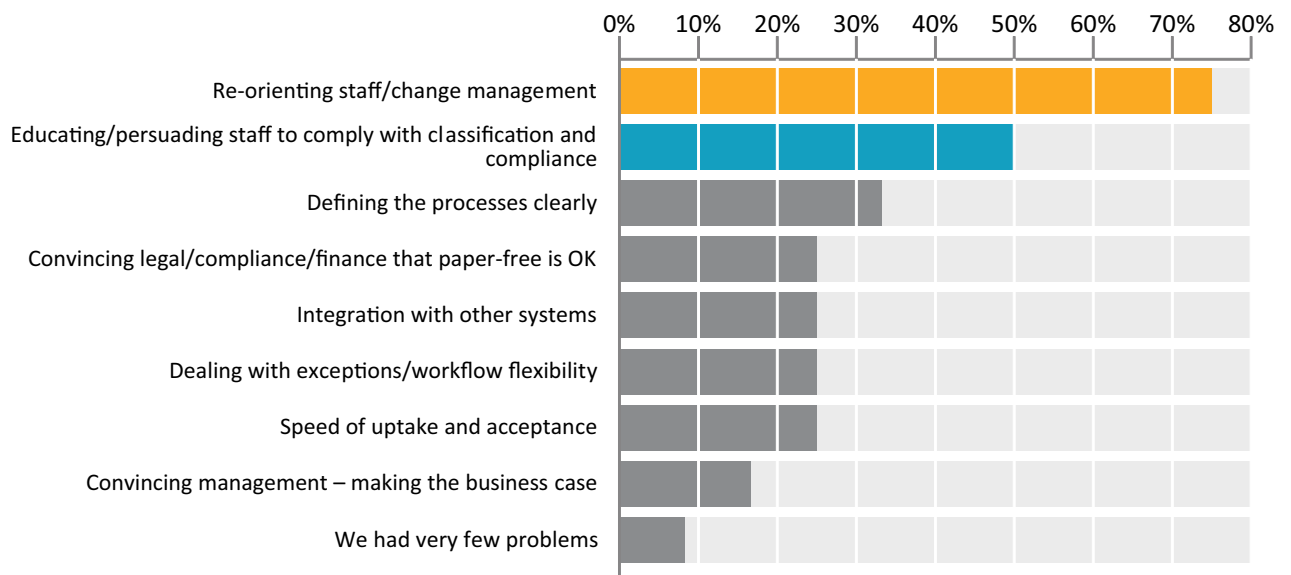
While indications are increases in spending, what is the likely source of procurement? Who will be the supplier of choice? Vendor direct purchases are the preference for 48% of our respondents, with 16% citing Systems Integrators (SI) and 15% citing Value Added Resellers (VAR) as their preference. This could indicate a sense that the vendor direct purchase will fit the need with little to no customization or heavy configuration requirements. (Figure 31)

Figure 31: How would you describe your purchase preferences?



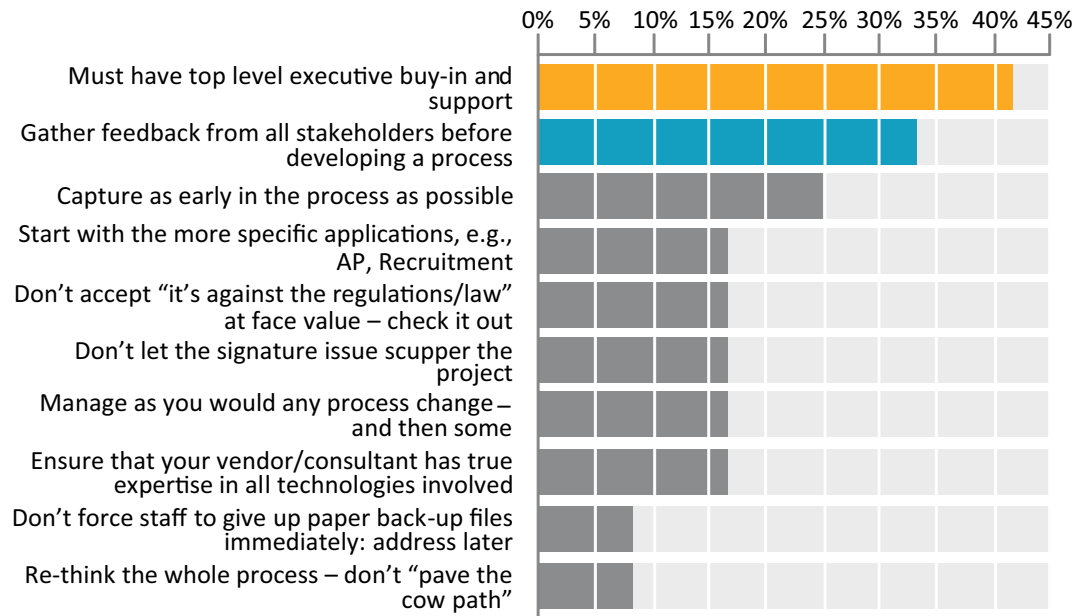
Given that there seems to be a level of comfort from the technology side of things, we asked our respondents to identify the top three difficulties they felt were of significance in relation to their paper-free projects. Change management once again tops the list with 75% of respondents citing this as their top difficulty. Staff education related to classification and compliance falls in second for 50% of respondents, while process definition (33%) rounds out the top three reinforcing the premise that content and process are tightly integrated and consideration should be given to both when developing a project. (Figure 32)

Figure 32: What were the main difficulties you encountered in these paper-free process projects?



As a best practice, it is strongly encouraged that lessons learned be documented for every project, for post-project review, and as a point of reference for future projects. The top two lessons learned from our respondents is to have executive level buy-in for your project (42%), and get the stakeholders involved (33%), ideally in the early stages of the project. (Figure 33)

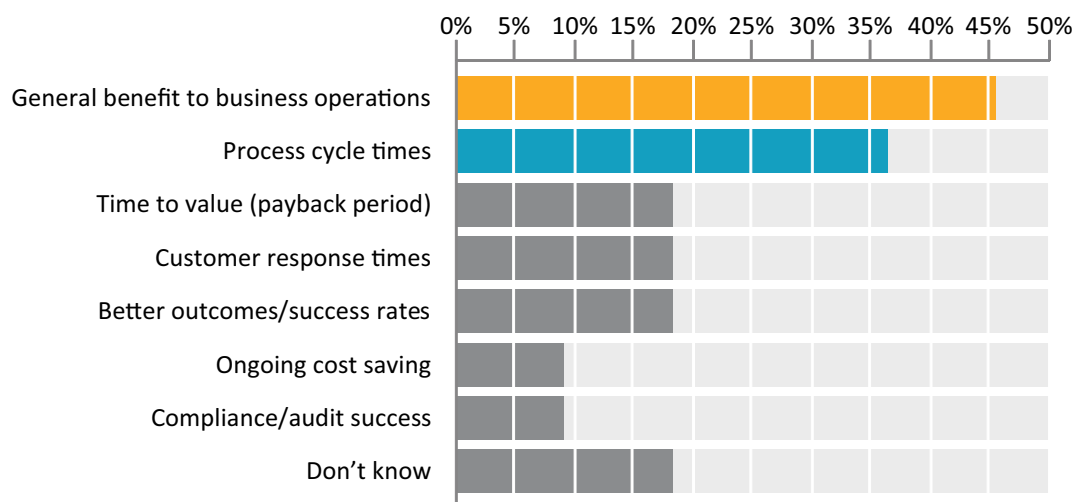
Figure 33: What are the key lessons learned from your paper-free processes?



Executive buy-in and stakeholder involvement at an early project stage are essential to implementing a successful project.

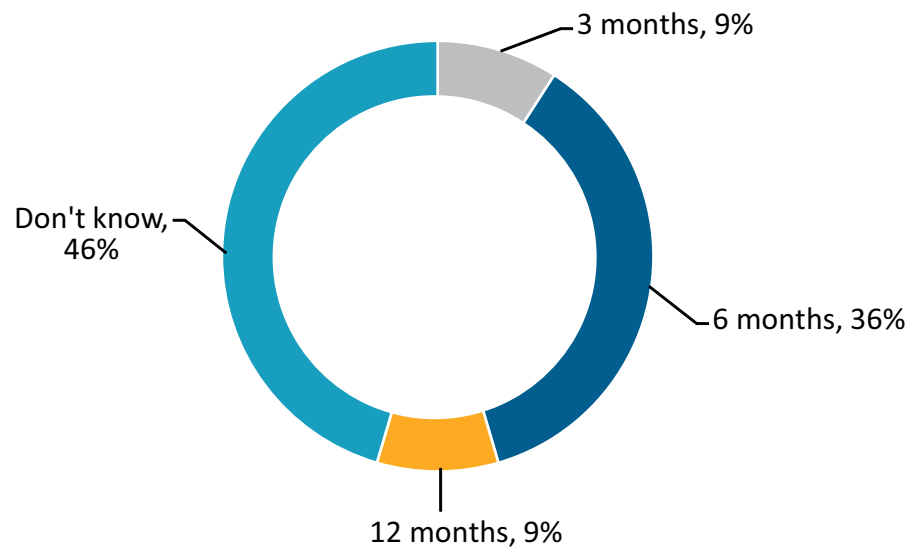
Success can be defined in many ways. We asked our respondents to identify what they saw as their top benefits. For 50% of respondents it is faster customer response while 42% cite reduced staff and higher productivity. We then asked how they measure the success of their projects. Forty-six percent of respondents say they look at the overall benefits to the business, while 36% are measuring process cycle times. (Figure 34)

Figure 34: What are the top criteria used by your organization to measure success in your paper-free projects?



Finally, we looked at payback periods in relation to paper-free projects. For 44% of respondents, the payback period was within 6 months, of those, 9% say they saw payback within 3 months. (Figure 35) Of course, this would be dependent upon the overall scope of the project, but indications are that paper-free projects can yield beneficial results fairly quickly.

Figure 35: Overall, what would you say has generally been the payback period for these paper-free process projects?



Conclusion and Recommendations

The song of being paper-free has been sung since the early days of document imaging. As technologies have advanced and business organizations have come to realize the negative impact paper has on operational processes, the move to reduce or eliminate paper is fast becoming a reality. And while it may not be enterprise level, there are definite signs that departmentally, as seen in this report highlighting changes in HR and AP, businesses are making the transition to a more digitally centric business model.

Organizations that have experienced the positive impact of eliminating paper from their processes - and that is the key to all of this, removing paper from processes - are moving forward by instituting regular process reviews to identify additional areas where paper elimination will benefit the organization as a whole, namely in the form of faster response times, cost savings, and improved cycle times. The fact that we are seeing return on investment rates as high as 44% within a six month period, is an indication that not only is paper-free possible, it can be done in a short period of time, depending upon the scope of the actual project. In these cases, the success of smaller projects will drive additional and eventually enterprise wide projects.

Capture is the first step in being paper-free, whether it is digitizing paper using scanners, or capturing digitally created information immediately and maintaining it in digital form; it is the first step to managing and ingesting information into the information ecosystem, business processes, and taking action on it sooner. Mobile capture, and the use of cloud enhance this capability by enabling the remote workforce to engage anytime, from any location, and maintain a level of engagement that mimics those workers who are local and resident within the corporate walls. This extension, resulting from being paper-free, takes operational efficiency, productivity, and responsiveness to a new level.

Change management and executive level support remain a challenge when it comes to being paper-free. People like to hold onto a physical piece of content, preferring this format for note taking, sharing, and even signature capture. Management, while they may recognize the importance and benefits of eliminating paper from processes, appear to be lacking in providing vision, and direction as to how, why, when, and where paper reduction and paper-free processes can and should be implemented.

In my view, the once elusive concept of paper-free business operations is today a real possibility. While it may be optimistic and unrealistic to think that all business processes and transactions will be paper-free in the near future, it is realistic to identify processes where paper can be removed. The only question is one of barriers. What is preventing the organization from eliminating the paper? Are there regulatory or legal requirements mandating paper be used and maintained, or is it a cultural issue where staff and management are more comfortable with the paper than the digital information?

Our research proves that it is very possible to move an organization forward by looking at the intersections where paper and process meet, and identifying the reasons that paper still exists. I encourage you to ask these questions. If there is no value or compliance reason for the paper, why are you still using it? If the information is created – born digital – why is it being printed only to be scanned back in?

Recommendations

- Identify a process and then document where paper enters your business and processes.
- Assess where process slowdowns happen and the reason this slowdown occurs.
- Evaluate how removing paper from operational processes will enhance customer response times, improve the overall customer experience, and save in back-office costs.
- Identify who is in charge of radical process review and seek endorsement for policies on paper-free processes.
- Promote successes where digital information and processes copies are being used within your organization.
- If you have no existing paper-free processes, pick one to trial – AP perhaps, or HR – but be careful not to become locked in to a single-point solution (e.g. from your finance system vendor).
- Ensure that existing paper-free processes are taking full advantage of OCR, data capture and integration with core enterprise systems.
- Evaluate how a scan-to-archive post process implementation can be changed to an up-front scan-to-process approach that improves operational efficiency by streamlining the overall process.
- Position the system “right at the door” as a digital mailroom, defending offices from paper, and ensuring the quickest possible conversion to digital.
- Do not limit your possibilities to be within the corporate walls. Look for ways to extend capture, access and engagement activities beyond the corporate walls using mobile and cloud applications.
- Establish a continuous improvement program that will periodically review and refine those changes you make now. When a paper-free project ends, it should be the beginning of an on-going process improvement practice that looks for ways to improve upon the foundation you have set.
- Taking the first step is better than taking no step at all. If you are unsure of where to begin or how to begin, seek professional assistance and/or training to help you set off on the right path. Look to your current suppliers and service providers for guidance. Turn to your professional associations and peers to find advice and training that will teach you best practices.



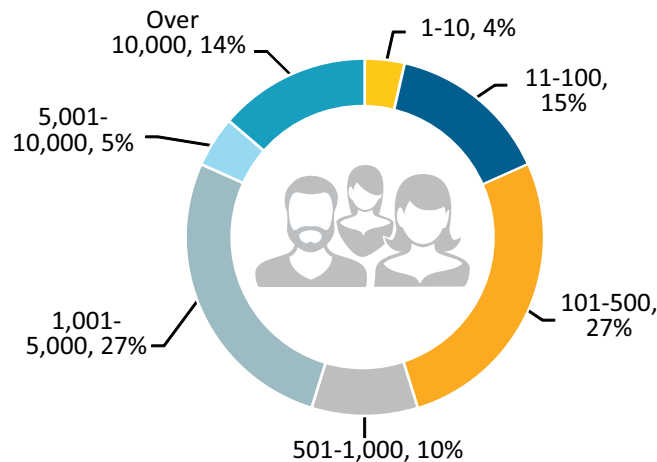
Appendix 1: Survey Demographics

Survey Background

199 individual members of the AIIM community during the month of August 2016 took the survey using a web-based tool. Invitations to take the survey were sent via email to a selection of the 193,000+ AIIM community members.

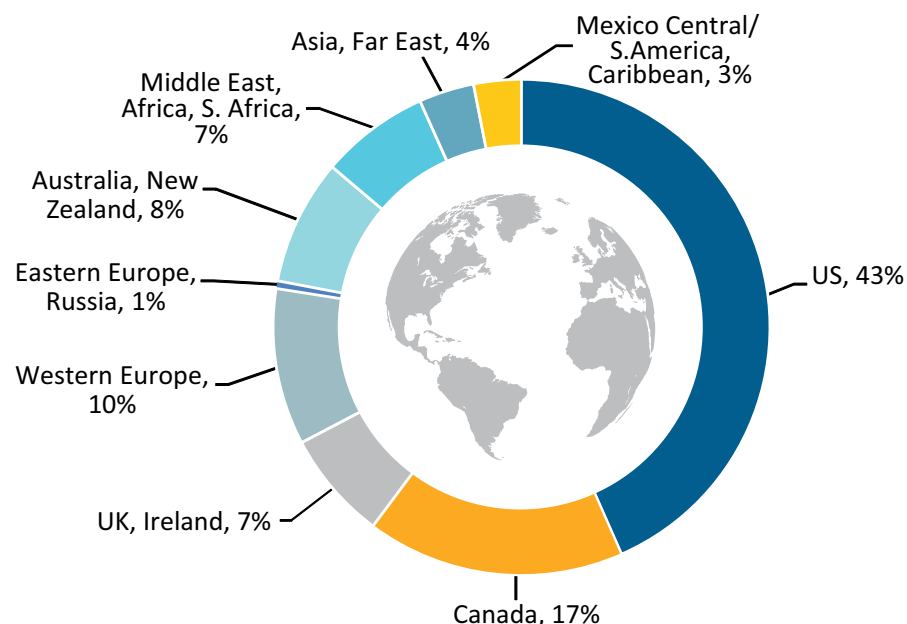
Organizational Size

AIIM survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 19%, with mid-sized organizations of 501 to 5,000 employees at 37%. Small-to-mid sized organizations with 1 to 500 employees representing the largest segment of survey takers.



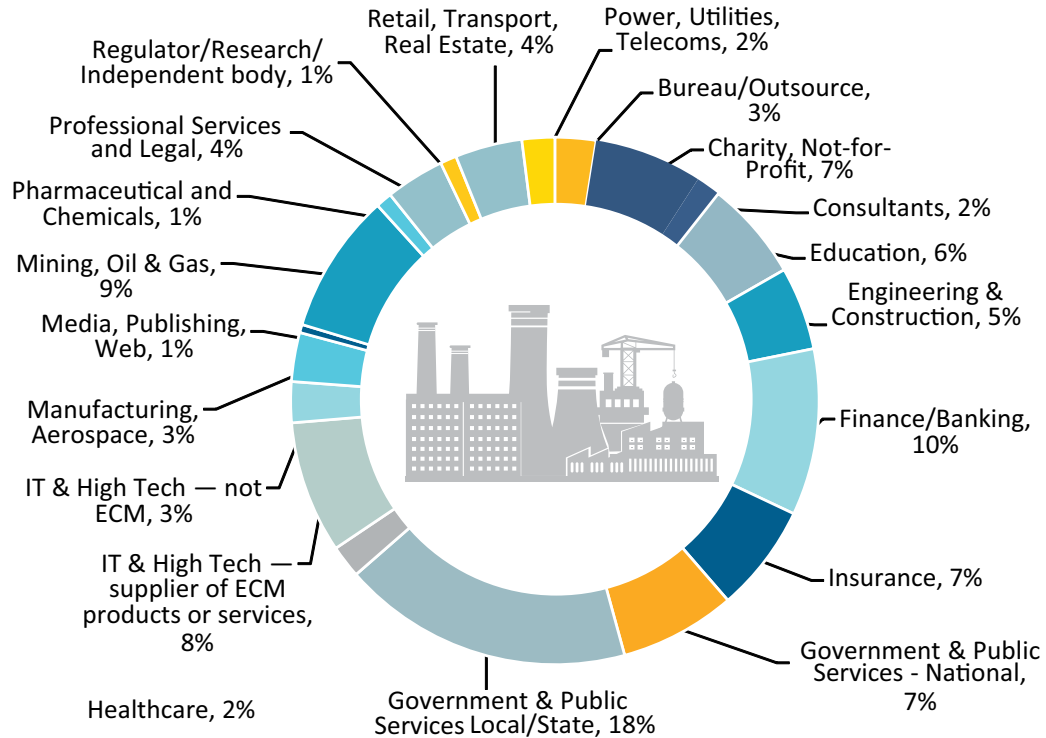
Geography

60% of the participants are based in North America, with 21% from EMEA-R, and 19% rest-of-world.



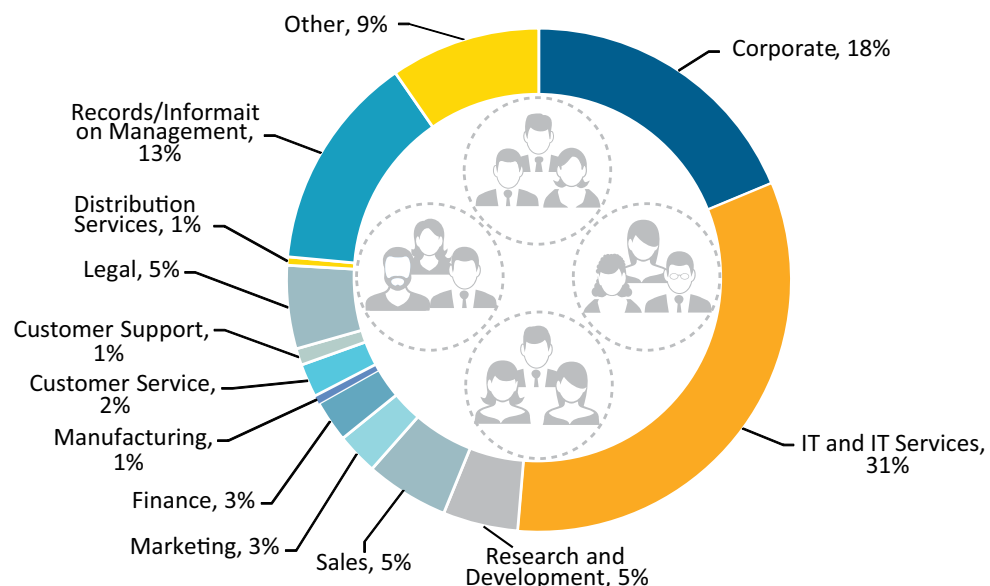
Industry Sector

Local and National Government together make up 25%, and Finance, Banking, and Insurance 17%, Mining, Oil and Gas 9%.



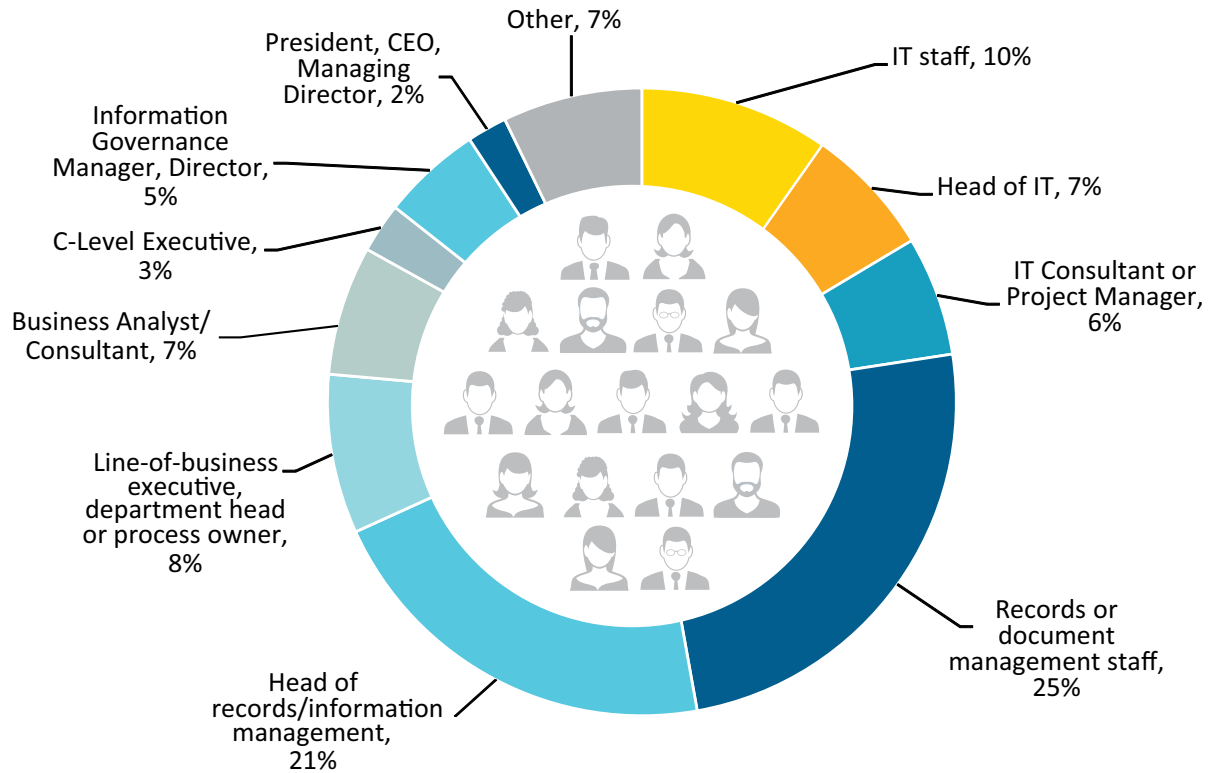
Departments

31% of departments represented are from IT/IT Services, 18% corporate, and 13% records and information management.



Job Roles

25% are records and information management staff, 21% heads of records and information management, 13% C-level Executive, President, CEO, and Line-of-Business Executives.





Appendix 2: General Comments

Do you have any general comments to make about your capture systems and mobile capture deployments? (Selective)

- Ad-hoc, chaotic, disjointed.
- Uneven across the enterprise.
- We are slowly introducing electronic business processes.
- In the exploration stage.
- We have the tools and are building, but nothing is active yet.
- CAPTURE IS NOT WELL UNDERSTOOD BY OUR BUSINESS SO THEY USE IT TOO LITTLE
- Its very tricky we are at the beginning stage of this trying to figure what works.
- Scanning documents into SharePoint helps us that the documents becomes searchable
- Electronic documents are great for storage, but they can be very hard to work with when you need multiple documents in support of a project.

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We help top business around the world on their digital transformation journey to accelerate cost-efficiency and time to market by rethinking operations and processes. By putting together our own software products, mobility and cloud computing and a comprehensive range of professional services, we deliver a unique customer experience across platforms and devices to increase loyalty, create new revenue streams and explore new markets.



systemware

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