

Work Like Tomorrow.™



The Digital Mailroom: The Powerhouse of Digital Workflow Transformation

KOFAX



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Executive Summary

The traditional mailroom is a thing of the past. As businesses continue to establish hybrid and remote work as the new and approved working model, the days of workers sorting through an influx of paper-based content are long gone.

But that doesn't mean the mailroom isn't important. On the contrary, it's an integral part of a successful business operation. Whether employees are working remotely or in the physical office, they need access to the documents and information coming in throughout the day.

Many organizations have already begun the shift to a digital mailroom as part of their larger digital transformation initiative. The disruption of recent years, however, caused many businesses to accelerate these efforts – and many now consider their digital mailrooms to be complete.

This may be an accurate statement for organizations simply looking to survive, but leading companies that want a competitive advantage aren't settling for a basic digital mailroom. Technology has advanced, and the application that digitizes your paper documents has a lot more to offer your business these days. Innovative intelligent automation technologies embed the latest machine learning and artificial intelligence to unlock the full value in all of the documents and data coming into your organization.

The evolved digital mailroom can efficiently process any content arriving in any channel and integrate the resulting context-sensitive data into the appropriate downstream business applications. This new powerhouse of business efficiency is no longer just a mailroom – it's a digital workflow accelerator.

Where are you on your digital mailroom journey? Are you satisfied with the status quo, or do you want to transform your digital mailroom and accelerate ahead of the competition?



Signs of the Times: 3 Reasons You Need a Digital Mailroom Now

In case you didn't get the memo (maybe it got lost in the mail), all signs point to digital.

If you've already begun your digital mailroom journey, it's time to further that investment. For those who are just beginning to digitize, the statistics below should be more than enough to convince you the future of mail is digital.

1. Customers are more demanding than ever: The customer experience is always evolving, but it underwent some of the most rapid change in history when the pandemic hit. Organizations had to find new ways to deliver products and services and answer customer queries with a remote workforce. The lack of in-person interactions, however, didn't lower customer expectations. On the contrary, customers expect fast, personalized service across their digital channel of choice. Looking ahead to a post-pandemic world, [Forrester](#) predicts brands will continue to offer these new services customers have come to enjoy.

Data lies at the crux of a personalized, omnichannel experience. Companies need access to the information in purchase orders, invoices, sales contracts, emails and other documents to provide accurate status updates and answers. Organizations also need to be able to take it a step further and identify customer sentiment in emails and other communications, so they can take a proactive approach to potentially negative situations.

2. Satisfying employees has become just as important as satisfying customers: The employee experience is the new customer experience, as workers vacate jobs in record numbers. Employees will continue to demand flexible working conditions, and the Great Resignation is likely to become the [Sustained Resignation](#). However, the majority (68 percent) of business and IT leaders believe they aren't completely prepared to support the shift to hybrid work, and 88 percent are concerned about the digital disparity between in-office and remote employees, according to the [Hybrid Work Global Survey 2021](#).

Remote and hybrid mailroom workers can't sort through paper documents and files manually (and they don't want to spend their time doing this anyway). They also need to be able to route information to the right department or person in a secure and timely manner from any location. Leaders know they need to leverage technology to meet the needs of the modern worker, and 89 percent plan to invest in technology in the next 12 to 18 months to support the hybrid workforce, the global survey discovered.



64% of business leaders said their companies need to build new digital businesses to stay economically viable as they look ahead to 2023, and 21% said they need to embed digital technologies into their current business models.

– McKinsey Global Survey on Digital Strategy

3. Agility and adaptability are not optional: The landscape has always been competitive, but now businesses also have to deal with constant change and disruption. Staff shortages, supply chain issues and an ever-changing trading environment create a never-ending obstacle course. Markets are changing, and there are new ways of doing business. Continuity can only be achieved by organizations that respond and adapt quickly to change and disruption. Systems, processes and applications must be consolidated and efficiently integrated. Digitization is the answer, and business leaders know it. Sixty-four percent said their companies need to build new digital businesses to stay economically viable as they look ahead to 2023, and 21 percent said they need to embed digital technologies into their current business models, according to a [McKinsey Global Survey on Digital Strategy](#). Adoption of advanced technologies will do more than help businesses survive – it will separate the leaders from the laggards. More than half (51 percent) of business leaders now view technology as a differentiator rather than just a cost of doing business.

A digital mailroom must not be left out of this transformation given the sheer volume of information that flows in and out of businesses on a daily basis – in multiple formats and across multiple channels. Most of this incoming mail is transactional – critical to various processes and operations running within the company. It needs to move through the chain quickly and accurately if you want to make well-informed decisions in a turbulent landscape.



Innovations: 5 Features of an Evolved Digital Mailroom

In a world of disruption and high customer and employee expectations, a basic digital mailroom is nothing to write home about. The cloud and artificial intelligence technologies transform a simple digital mailroom into a powerhouse that's sure to get the stamp of approval by customers, employees and partners. Make sure your organization's mailroom takes advantage of the following innovative features:

- 1. Document intelligence:** Several types of artificial intelligence technologies work together to deliver faster and more accurate document processing across the entire enterprise. Natural language processing (NLP) extracts key information and can even decipher sentiment. Machine learning categorizes documents such as invoices, sales orders and contracts to ensure they get routed to the right people and departments. With mobile capture, companies can capture a document, optimize it for processing, convert it to a preferred format and extract necessary data, all from a mobile app. Each of these is a necessary element for a successful digital mailroom that can handle all the information coming in, regardless of format or channel.
- 2. Connected systems:** More often than not, the data coming into your organization needs to be routed to more than one location, including various applications, software and databases. A connected systems approach to a digital mailroom provides an open and integrated architecture. The resulting ecosystem unites disparate systems and makes it easy to scale automation and process and share information securely.
- 3. Process orchestration:** Process orchestration is all about optimizing your human and digital workforce and creating digital workflows for the mailroom. Digital mailroom automation software equipped with process orchestration makes it possible to get more work done without hiring more human workers. In fact, human employees can spend less time manually sorting through incoming mail and routing it to the right workflows and more time on higher value tasks that make your customers and suppliers happy.

- 4. Robotic process automation (RPA):** RPA is the intelligent automation technology that makes it possible to automate the manual, time-consuming tasks of the mailroom. Digital robot workers are ideal candidates for processing, extracting and validating incoming information. The work is done faster and without errors. Human workers are brought in to handle exceptions, which they can now process faster since this is a small percentage of incoming items. RPA streamlines mailroom workflows, saving time and money. RPA bots can also keep up with the increased flow of information coming into the organization, so you don't need to worry about how you'll handle the growing volume of mail over time.
- 5. Low-code platform:** Pre-built connectors and templates enable citizen developers to assist with the digital mailroom makeover. Citizen developers may lack the technical skills traditionally needed to automate processes, but they possess valuable business knowledge and firsthand experience. Low-code features make it possible to put more resources toward digitization, speeding up the process. Additionally, the fresh, non-technical perspective citizen developers bring to the table can help prioritize initiatives to ensure you tackle the biggest bottlenecks first.



RPA (robotic process automation) streamlines mailroom workflows, saving time and money, and bots can keep up with the increased flow of information coming into the organization.



Reap the Rewards: 6 Benefits of an Innovative Digital Mailroom

Organizations that leverage all that intelligent automation and the cloud have seen quick and substantial gains. ROI is typically realized in the first year, thanks to the following benefits:

- 1. Cost savings:** As with most other business processes, sorting through incoming mail and other communications manually is time-consuming. Since you're paying mailroom staff to perform this work, it costs your business more in terms of wages. It also costs you more in lost opportunities and efficiencies, as much of the mail coming in is critical to operations. Mailroom automation lowers operating costs. Faster processing keeps business processes running more quickly, which is better for your bottom line. Plus, you can easily scale your digital mailroom, extending it across the enterprise for even bigger savings.
- 2. Faster processing times:** Your customers and vendors don't care how much information is coming into your organization every hour. When they have a question or an issue, they want (and expect) a fast and helpful response. The number of messages coming into your business is only going to grow, making it harder and harder for manual processing to keep pace with customer and supplier expectations. With digital mailroom automation, however, you can accelerate document processing. Automation can even convert the unstructured data coming in so it's ready for your line of business systems. Human workers can focus on handling exceptions, which can now be processed in minutes.
- 3. More accurate data:** Everyone makes mistakes; it's a part of being human. When incoming information is manually processed, there's bound to be errors. A human employee may key in the wrong data into an enterprise system, or a message may get routed to the wrong person or department. While this is understandable, mistakes slow down operations, increase costs and, in some circumstances, can contribute to a negative customer experience. With automation, you can rest assured all incoming data is extracted, validated and routed accurately.

- 4. Better document security and compliance:** Have you ever put an important document somewhere for safe keeping only to forget where you placed it? Or maybe an incoming letter with sensitive customer data was intercepted by someone with malicious intent. Digital documents are more secure than paper ones. You don't have to worry about losing a piece of paper, and you can control who has access to specific content. Intelligent automation also makes compliance easier. Companies can apply business rules for applicable industry regulations, and an electronic audit trail serves as a record of proof. Improved compliance has an added benefit of cost savings, as it helps your company avoid hefty penalties.
- 5. Happier customers and suppliers:** Employees need access to the most up-to-date and accurate information in order to assist customers and suppliers. A customer may want to know if their payment was received, or a vendor may need an update on a contract negotiation. A digital mailroom enables employees to see whether a document has arrived and if it's been transferred from one department to another. Customer and supplier queries can be tracked down quickly, creating a more positive experience.
- 6. Improved insight and control:** A digital mailroom powered by intelligent automation empowers organizations to analyze and monitor critical applications. Actionable data improves visibility into which business processes are running smoothly and which ones need improvement. Companies can continue to monitor processes over time to ensure any changes made deliver the desired result, providing greater control over performance and deeper insight about where to focus time and money for further improvements.



The Powerhouse in Action: Real Companies. Real Success.

Still not ready to fill out your change of address form and move to a modern digital mailroom? See the powerhouse in action with these three real-world success stories.

A Leading Energy Service Provider in Austria

Before

The company receives large volumes of mail every year, including approximately 60,000 invoices and requests such as address changes. Many of the documents arrived in paper format. While some were delivered to headquarters, others were sent to regional offices. The company was using a traditional mailroom approach, delivering mail to departments twice a day. Accurately capturing, recording and storing the information manually was extremely time-consuming and labor-intensive. Plus, if someone was out of the office, an important piece of mail could go unopened (and unanswered) until they returned. grande satisfaction client.

After

The company turned to a digital mailroom solution powered by intelligent automation. Now, when a document arrives, it's immediately scanned and routed. Information coming in from other channels like email is also captured and fed into the central mailroom workflow. Extracted data goes to the appropriate system instantly, for faster resolution. Employees can respond to customers faster, and mail arrives hours earlier than it used to. Mail sent to the branches is delivered to headquarters instantly, whereas it used to take two days. Productivity has increased, and the company is saving 30 minutes per day on processing invoices and returns.



A flexible and scalable solution helps departments with smaller budgets and teams realize the benefits of digitization, including lower operating costs, improved compliance and faster processing times.



A Global Full-Service Provider of Outsourced Business Process Management

Before

The company discovered in many cases processes and departments seen as “non-critical” were often being left out of their clients’ digital transformation strategies. These smaller areas often didn’t have the time or resources to manage digitization - but that meant they didn’t reap the benefits. The company wanted to find a way to help these smaller departments get started down the path of digital transformation by moving to electronic documents.

After

The company turned to a cost-effective and easily deployable digital mailroom solution. Clients have access to a variety of digital mail services, along with case management and archiving capabilities. Users can manage incoming mail with a single click, and it’s easier to locate information. They’re also benefitting from a document audit trail. A flexible and scalable solution is helping departments with smaller budgets and teams realize the benefits of digitization, including lower operating costs, improved compliance and faster processing times.

A Global Telecommunications Provider

Before

The company was struggling to stay on top of accounts payable workflows. Nearly 1,000 mail items were coming into the AP department every day. Most of the messages pertained to invoices and paying the bills on time was a high priority. People were manually opening the invoices and then passing them to another team for validation. The data still had to be manually keyed into the system, then processed for payment. It took an average of 14 days to process an invoice, but most suppliers required payment within 20 to 25 days. The company risked paying late payment fees or even being cut off from supplier services given the long processing time.

After

The company moved to a fully digital mailroom. Intelligent automation extracts key information from invoices and automatically integrates the data into back-end finance systems. Thanks to RPA, they have moved away from paper billing and are now doing it electronically, and they currently retrieve around 9,000 invoices per month from 30 vendor websites. The company can now process invoices in one day, 95 percent of AP operations have been digitized and they estimate productivity has increased by 400 percent per person!





Will You Settle or Excel?

The world in which organizations operate is evolving at a rapid pace. Market conditions, customer and employee expectations, and even the way business is conducted can change overnight. One thing that remains the same, however, is the steady flow of information in and out of your business. The sooner you can capture, process and analyze that data – and make it available to the right people via the proper applications – the faster you can adapt your business to the needs of the day. A powerful and modern digital mailroom increases operational efficiencies, improves security and compliance, reduces costs and creates the type of experience customers and employees demand.

Is your digital mailroom signed, sealed and delivered? Or are you ready to keep evolving so you can accelerate towards a superior experience and competitive advantage?

You know there's invaluable data in the information coming into your business. We make it easy to unlock it.

To learn more, visit <https://www.kofax.com/workflows/operations-workflows/digital-mailroom>.



About Kofax

Kofax® is a leading provider of smart process applications for the business critical First Mile™ of customer interactions. These begin with an organization's systems of engagement, which generate real time, information intensive communications from customers, and provide an essential connection to their systems of record, which are typically large scale, rigid enterprise applications and repositories not easily adapted to more contemporary technology. Success in the First Mile can dramatically improve an organization's customer experience and greatly reduce operating costs, thus driving increased competitiveness, growth and profitability. Kofax software and solutions provide a rapid return on investment to more than 20,000 customers in financial services, insurance, government, healthcare, business process outsourcing and other markets. Kofax delivers these through its own sales and service organization, and a global network of more than 800 authorized partners in more than 75 countries throughout the Americas, EMEA and Asia Pacific.



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