

# The Process Automation Buyer's Guide



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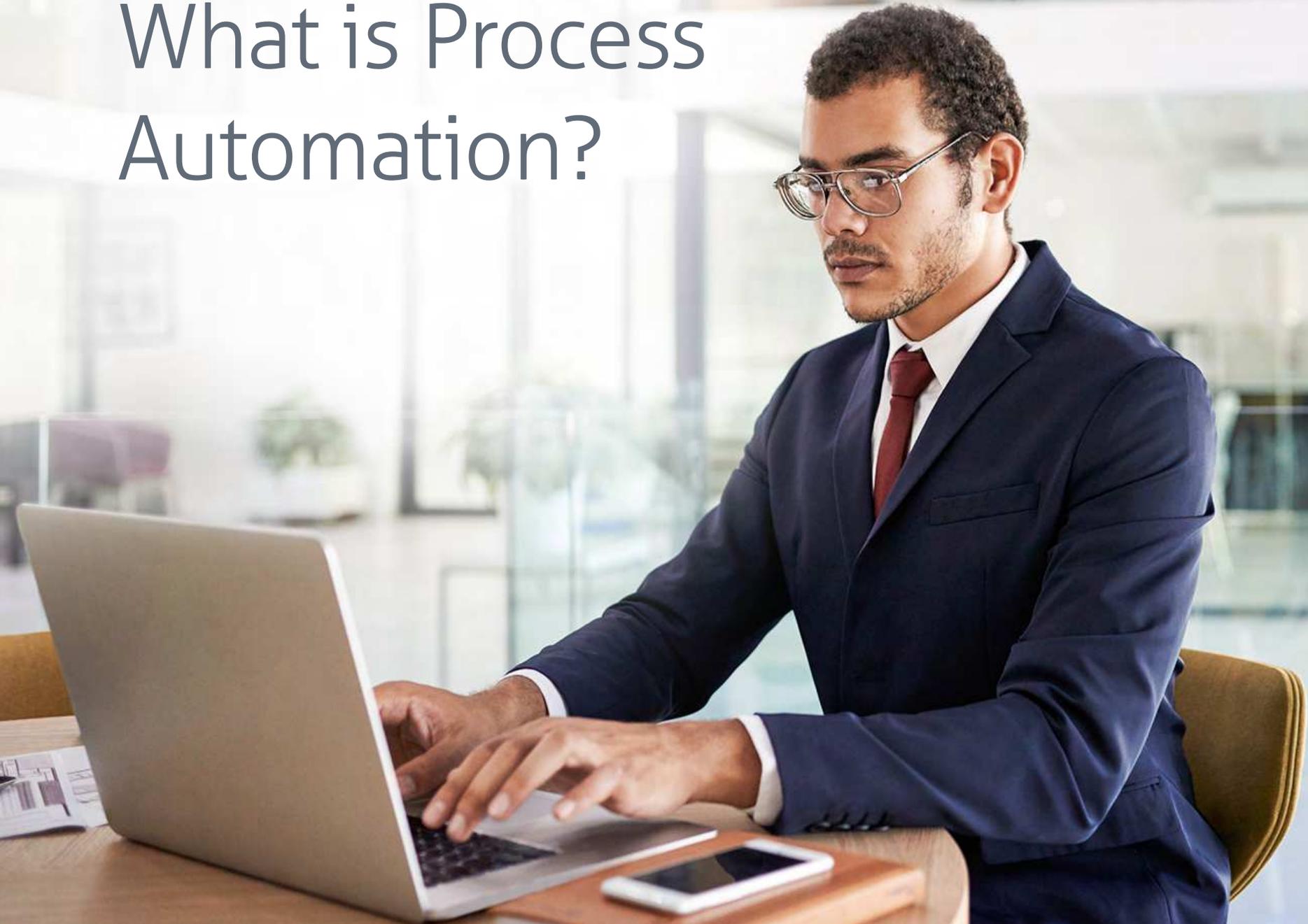
# Introduction

Learn what process automation is, why organizations need it and how to procure the right software for your workplace.



## Chapter 1

# What is Process Automation?



**Process automation**, also known as business process automation or business process management is the use of technology to automate routine tasks, such as data entry, routing information between parties, organizing documents and more.

This is the type of automation covered in this guide — that is, automation that makes human lives easier by transforming time-consuming busywork into seamless processes that accelerate how work gets done.

Today's automation platforms use innovative technologies such as artificial intelligence and machine learning to perform increasingly complicated tasks, such as capturing information directly from documents. Still, humans are the ones who drive change and innovation. Automation simply allows them to do more as they work to keep the world moving forward.

## Chapter 2

# Benefits of Process Automation



Process automation can produce a variety of benefits for your organization:

- **Increase focus on more strategic initiatives:** Give staff more time to plan courses of action instead of filling out forms, organizing content or tracking down approvals.
- **Grow your business:** Speed up turnaround times for customer-facing processes, boosting customer satisfaction and enabling you to take on more business.
- **Boost productivity:** Reduce the manual effort involved in staff's day-to-day processes and the cost of potential reworks due to human error.
- **Improve transparency:** Enable staff and executive management to see the status of current processes at every stage.
- **Reduce costs:** Minimize the cost of performing manual work, increasing staff and resource bandwidth for other initiatives.
- **Spark innovation:** Free up talent to focus on big-picture, innovative projects, like generating new sales or improving relationships with your customers.
- **Identify bottlenecks early:** Easily track and report on processes to detect potential inefficiencies and address them promptly.
- **Make audits a breeze:** Make data and document transactions easier to keep track of and account for, giving auditors a clear picture of how your business operates.

## Chapter 3

# Examples of Process Automation



Process automation software can assist organizations with a wide variety of business challenges:

- **Contract management teams can manage projects and initiatives globally:** Process automation can route important documents for approval to major stakeholders, wherever they are in the world.
- **Accounts payable departments can process paperwork faster:** Gather invoice information quickly with AI smart capture technology, while utilizing reporting features to track and monitor the entire AP process.
- **Human resources departments can reduce manual tasks:** Automation tools can assist in eliminating manual data entry and streamlining the flow of information between different systems such as those for recruiting and onboarding.

## Chapter 4

# Finding the Right Solutions



Finding the process solution that fits your organization starts with looking at your internal processes as they exist, identifying opportunities for automation and evaluating the marketplace for solutions.

## Identifying your needs

Before looking at any solution, you should identify the processes you want to overhaul or optimize. You'll want to gather as much information as you can on your internal processes before starting to research vendors. This includes:

- What processes you plan to improve with automation
- If your solution needs to be used by one department, a few departments or the entire organization
- What you need to deploy your new solution, including any current hardware, software or systems you want to use alongside it
- How many users will have access to the system and what privileges they need
- How much budget you have to spend on a solution

## Conducting research

Before you decide on a solution, you might want to look at analyst reports from notable companies such as Gartner and Forrester, or read product reviews on G2 Crowd. These firms build their reputations on reviewing software solutions, and can likely give you a snapshot of how each solution stacks up. Also be sure to look at each vendor's marketing materials, including:

- Product pages
- Blog posts
- Product demos
- Feature lists
- Videos
- Software trials

Consider whether a particular vendor has a specialized field of expertise, or if it's considered a thought leader in its industry. Also note that some vendors don't sell their software directly, and instead work through a network of software resellers. If this is the case, also be sure to vet the reseller to ensure that they provide the software and level of service your implementation requires.

## Contacting vendors

Once this preliminary research has produced some viable candidates, communicate with stakeholders to decide on which vendors to contact. This can be done via a sales call or through email.

If you're interested in a more formalized buying process, you can also send a request for information document that clearly and specifically outlines the capabilities you want from a potential vendor.

The most important part here is to ask as many questions as possible. You'll want to have complete clarity about pricing, utility, support and more. We'll outline all of the factors to consider in the next section.

## Chapter 5

# Factors to Consider for Process Automation Platforms



When you communicate with vendors, whether through RFIs or otherwise, it's important to make it clear what you want from their solution. Here's some of the factors to look for when conducting your research.

## Licensing structures

When choosing process automation software for your organization, it's worth discussing how you want to license it. Below are a few key considerations:

- **Individual vs. volume:** Many of today's software vendors offer both individual and volume licenses. An individual license can be applied to a single machine, user, or in some cases a few more as part of the package, but usually less than ten.

Volume licenses can be applied a few different ways, but usually represent a single license that can be applied to an entire organization, saving time and resources for both the vendor and the customer.

- **Perpetual vs. subscription:** When purchasing software, you may have a choice between a perpetual license and a subscription license.

Perpetual licensing offers indefinite use of the purchased software for a large upfront cost, and may require you to update your software manually to take advantage of new features and bug fixes.

Subscription licensing does not require you to pay as much upfront and instead offers software that's automatically updated for a monthly fee. Typically, you also have the option to pay the monthly fee on an annual contract basis at a discount.

## Software resellers

Many vendors offer their product exclusively or semi-exclusively through software resellers, who package hardware, services and/or software together to provide comprehensive and effective solutions for customers. Here's what you'll likely want from a reseller:

- **Proven experience:** Make sure they know the software, and preferably your industry, well enough that they can provide you with the resources and knowledge you need.
- **Comprehensive services:** You'll want to make sure that a reseller provides all the services and equipment you need to get your solution fully up and running and working as intended.
- **Personalized attention:** The right resellers will work directly with your IT department to determine the best course of action as far as implementation.

## Deployment methods

Some vendors offer the choice to deploy your solution in the cloud, or on-premises at a site owned by your organization:

- **Cloud:** Cloud-based software offers customers an opportunity to install their process automation solution on another organization's servers. Popular platforms offering these services include Amazon's AWS and Microsoft Azure. You may also be able to use your software vendor's own cloud platform infrastructure.

These platforms and software solutions are usually offered as part of a subscription-based model, as an alternative to purchasing, maintaining or upgrading your own hardware. Although the solution is stored in the cloud, most modern cloud software vendors offer extensive security capabilities to address any concerns. Many cloud platforms even offer automated backups, increasing your ability to recover information in case of disaster.

Cloud platforms also offer the choice to run your software and services as part of a multi-tenant or single-tenant architecture. Multi-tenant solutions share your computing resources with other organizations that have opted to use the multi-tenant cloud. This may cause your performance to be more variable than a single-tenant solution, where your solution's computing resources are completely yours to use at any time.

- **On-premises:** This option has you install software on your own hardware that you can configure how you see fit. If you are capable of procuring your own hardware and want complete control over security, this option may be preferred. However, on premises solutions are more resource heavy and cost intensive.

## Implementation

A smooth implementation process is essential to realizing a return on investment in your expected timeframe. Here are some important characteristics you'll need to look for as far as implementation:

- **Configurability:** Many process automation solutions have simple and advanced setup options. Simple setups can be fast, but you may want an advanced setup's configurability based on what other systems or databases your organization already has in place. The most powerful systems will allow you to set up an advanced solution just as easily as a simple one.

In addition to the system itself, you'll also want to ensure it's easy to set up user accounts and administer security settings.

- **System requirements:** If you're using an on-premises solution, make sure that your hardware meets your software's system requirements and that you purchase any specialized components needed for the software to run. You'll also want to note if any firmware is required to run a particular piece of hardware, or if it can work as soon as you plug it in.
- **Scalability:** Even the simplest setup packages can become tedious if you need to utilize them multiple times for large deployments. Consider your prospective system's installation process at scale and if it can be configured or installed on multiple machines at once when choosing your solution.
- **Capability:** When using process automation software, you'll want to make sure that each step in the processes you create can do what you need it to. This is why it's important to take a deep dive into the specific actions a solution can perform, and if you can configure these actions to meet your needs.

## Integration capabilities

Most organizations need their process automation solutions to work with other enterprise software. You'll want to make sure the solution you're assessing works with any software you're using or plan to purchase in the future, and that you have the IT resources to set up, implement and manage any integrations. Here are a few types of integration tools vendors usually offer:

- **Application programming interfaces:** These can be thought of as a list of commands you can give an application with code. If you have the staff resources, you can code custom integrations with APIs to creatively solve any communication issues between systems.
- **Pre-built integrations:** Typically offered by the vendor, a third party or built natively within the software itself, pre-built integrations should only need a few details about an external system to integrate with it, and can appear directly within an application's graphical user interface.
- **Code-free tools:** In cases where a pre-built integration or an API doesn't exist and you don't have the resources to code your own solution, some vendors offer code-free integration tools. Many of these tools work by simply mimicking human behavior, but with the processing speed and accuracy of software.
- **Content Importing Tools:** If your invoices, contracts or other transactional content are part of the processes you plan to automate, you'll need to make sure your solution provides technology that lets you bring external content into your system, such as capture technology or optical character recognition.

## Support

Proper support and training are essential to ensuring user adoption of your new solution and its success. Here are some of the prominent types of support you want to look for when choosing a solution:

- **Hands-On Training:** You'll want to see if your solution's vendor or reseller offers in-person training or workshops. Online training is also an attractive option, provided it offers comprehensive curriculum and opportunities to answer questions from learners.
- **User Community:** Whether in-person or online, a vibrant community is a powerful resource for users looking to troubleshoot and share their expertise. You'll want to see what community resources and events your vendor offers — such as industry conferences, networking opportunities and user groups — when making a decision.
- **Online and Phone Support:** Most vendors should offer phone or online tech support. However, make sure to check the availability of your prospective solution's support team, and ensure that they'll be available when you need them.
- **Documentation:** Even solutions with the most intuitive interfaces and experiences need documentation. As process automation solutions by nature have many moving parts, clear and concise learning materials become essential tools for users to get the most out of their product.

## Security

Security is necessary and critical in today's world — your process automation platform should be no exception. These are some characteristics to look for when deciding on a solution:

- **Access rights and privileges:** Your solution should have configurable access so that only authorized users can access or edit your business processes or view sensitive content.
- **Compliance and certification:** Some industries have particularly strict compliance requirements, such as HIPAA for healthcare and FINRA regulations within the financial sector. Some may even require specialized hardware, such as Write Once, Read Many storage for retained records. Make sure the software you choose has the features you need to meet these requirements.

A good place to start is looking at certifications, such as the American Institute of Certified Public Accountants (AICPA) Service Organization Controls 2 (SOC 2) certification. Vendors must meet a high standard for security and privacy controls, and prove this to auditors to receive such recognition. It's thusly a good measure of the vendor's ability to support your compliance efforts.

## Ease-of-use

How quickly users can pick up the software and put it to productive use should be a primary consideration when looking at different solutions. The best process automation solutions offer powerful capabilities with a short learning curve:

- **The User Experience:** You really need to know if your users will know what to do once they're using your solution. Make sure the interface is easy to understand and intuitive.
- **Process Templates:** In order to get processes up and running quickly, you may want to find a solution that offers ready-to-use process templates, preferably with the ability to customize afterwards.

## Chapter 6

# The Procurement Process



Once you know what to look for, it's time to start thoroughly comparing your options so you can make the right decision. Read on to discover strategies you can use to stay informed at each step in the solution procurement process.

## Compare and contrast vendors

If you sent out RFIs during your research process, look at vendor responses. The relatively formal presentation of RFIs should make the distinctions between your options easy to identify. In situations where RFIs aren't used, internal staff should still conduct thorough assessments of potential vendors that clearly outline their offerings.

With this new information, you should be able compare the particular benefits — such as those outlined in previous sections — each vendor offers for your organization. You'll want to look at criteria such as:

- **Price:** Look at any preliminary or previously researched prices to get a relative idea of how much each solution costs compared to its competitors.
- **Utility:** Make sure this solution has the features you need and want.
- **Usability:** Assess whether the software is easy to set up and work with on a daily basis.
- **Security:** Ensure the solutions you're considering have the right security measures that enable you to support compliance with any current or upcoming industry regulations.
- **Support:** Clarify that both your vendor and reseller can help meet your deployment needs as well as provide ongoing support.

For a more detailed analysis of a vendor, you may want to schedule a general demo to test the software, gather more information via phone or email, or submit a request for proposal to prospective vendors.

RFPs typically include specific solutions and packages you want to purchase, and are usually created after consulting your internal stakeholders about items to include.

## Identifying your top contenders

When you start getting responses to your questions from vendors, use their answers to narrow down your options to a few main contenders. You'll want to make sure that the solutions you choose at the contender stage share most, if not all, of the major capabilities you want. Comparing solutions with similar options helps to simplify the decision by making key differences much easier to identify.

## Scheduling a specialized demo

With only a few similar solutions left to decide between, you'll want to schedule a custom demo with each of these vendors. Although you may have seen a demonstration earlier in the procurement process, it's important to get a specialized demo that addresses deeper interaction, such as a fully featured sandbox environment or a custom environment that fits your organization's expected use cases.

Note that at this stage, you'll likely have to be even more inquisitive than you were on the phone. It's important to test both common and fringe use cases, and to ask if you can test out installing and deploying the software. Testing with these criteria in mind will help you ensure that the proposed solution will meet your needs and is easy and intuitive to use.

## Making the purchase

Once you have a list of options you're considering for purchase, it's time to start negotiating price.

This includes more than just the base price for the application itself. Many vendors charge per-user, so you'll want to be careful about balancing your costs with your needs – if you don't purchase enough user accounts upfront you may limit scalability, while purchasing too many may make your solution unnecessarily expensive.

On the other hand, some vendors offer steep discounts for large-scale solutions compared to smaller-scale ones. You'll want to find a balance here to get the largest return on your initial investment.

When you have final prices for each solution, you'll want to compare them and understand why one vendor has a lower or higher price than another. At this point, most vendors' offerings should be comparable, which can again highlight differences more clearly, so you can make an informed decision.

Still, you'll want to make sure all stakeholders are aware of and approve of a vendor before making your final decision to purchase, as your understanding of a vendor's options may have changed during the solution procurement process.

Most importantly, be sure to do a detailed financial analysis, looking at the initial cost of your system, its recurring costs and the money you'll save over time. This will help you determine the true ROI of a solution, which might ultimately be the deciding factor on which vendor you decide to go with.

## Implementation

When you finally decide on a solution, it's time to start getting value out of your purchase. Here are a few things you should keep in mind when implementing your solution:

- **Familiarize yourself with the software:** The software you procure may likely accomplish tasks in a different manner than your previous solution — which is probably one of the main reasons you purchased it. Be sure to use this change as an opportunity to reevaluate how your processes work, and come up with new processes that take advantage of your new software, instead of trying to imitate how these processes operated in your previous system.
- **Contact support when you need it:** Many vendors and resellers offer implementation and support packages to get you started. If the staff and resources you can dedicate to implementation are limited — or if you just want to utilize best practices when setting up your system — it may be beneficial to purchase one of these packages. If you do, make sure your IT department clearly and regularly communicates with support staff for a smooth implementation.
- **Make an onboarding plan:** it's important that, in addition to your IT department and main stakeholders, end users are also familiar with your solution. It may be a good idea to set up training programs to help users get accustomed to the new system and ensure that they also know how to effectively use it.
- **Come up with a change management strategy:** Even if your users know how to use the software, you'll still want to advise and instruct them — through department or company-wide announcements, information sessions, online training or downloadable resources — on how the new solution will impact their day to day work and existing processes. Also, be sure to roll out your software on a timeline that limits potential disruption, such as a time of year when the system won't be used as frequently.

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