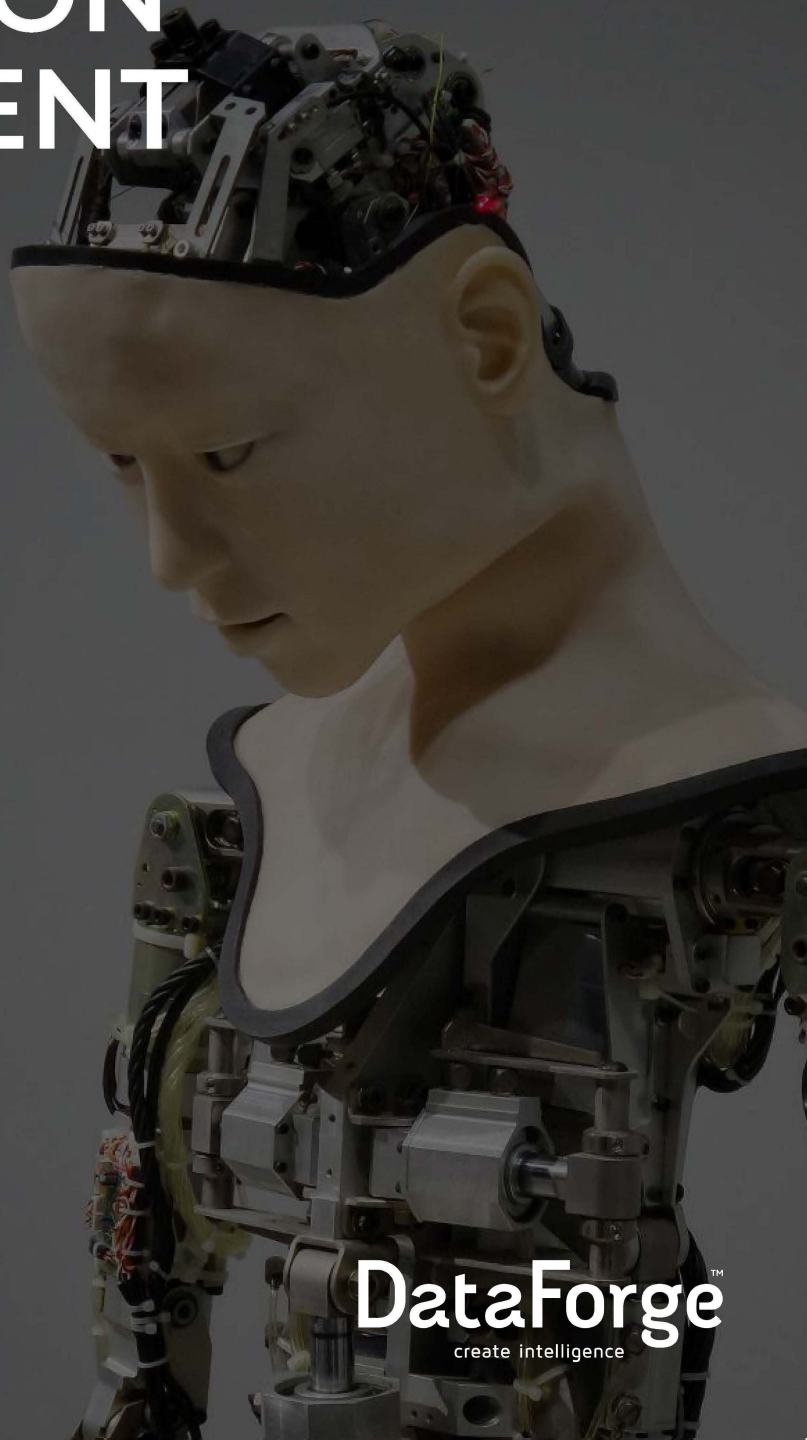


# AUTOMATE YOUR BUSINESS PROCESSES WITH INTELLIGENT INFORMATION MANAGEMENT



**stratas**  
information innovation

**DataForge**  
create intelligence



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# AUTOMATING BUSINESS PROCESSES AND DOCUMENT-RELATED WORKFLOWS IS CRUCIAL TO DIGITAL TRANSFORMATION

**Information management, business processes, and business systems need to be aligned to improve efficiency, customer experience, compliance, and to put content in context.**

Document-intensive processes need to be digitised. The reason is simple: digitisation improves the customer journey and experience and enhances your organisations competitive advantage. Furthermore, a digital workplace not only supports process owners, but it also helps compliance officers, partners and customers focus on core business tasks.

Digital transformation is here to stay. Yet, according to Forrester<sup>(1)</sup>, many enterprises still struggle with this transformation. This is because many organisations still have a way to go in automating operational processes around the customer journeys.



**For businesses to truly embrace digital transformation, they need to integrate their back and front office operations.**

Customers want a seamless experience regardless of contact channel or person. No matter how they're interacting with the business — ordering goods, filing complaints, or requesting information — the customer wants a good service experience.

This is only possible by automating processes and removing silos between customer service applications, customer data, and related documents and content.

The **ULTIMATE GOAL** is to **WIN, SERVE** and **RETAIN** customers.

<sup>(1)</sup>Forrester - Refocus process automation to rescue your digital transformation - May 17, 2018



Digitising business processes not only automates existing processes, it can also lead to reinventing processes. The best way to handle a process might not be to just transfer the formerly manual process to a more automated process. It can call for a total rethinking of ways to handle business processes.

The number of systems and applications within a business keeps on growing. No single system can deliver all the functionality required. To make transformation possible, information management must step up to support it. Bridging the gaps between individual applications is a key element of digitisation. Improving customer experience, gaining cost savings, expediting efficiency, and improving compliance are typically related to how the information management processes work.



Often when workflows and processes are digitised, it is done by adding more single-use systems and applications. This is problematic because it results in increased information chaos as these applications remain siloed.

Smart usage of information is necessary to gain business efficiency. And smart usage of information is dependent on gaining access to all relevant information to support decision-making. There is no place for silos; employees need easy access to relevant information when they need it. Information — and access to it — needs to support their working processes.

**BRIDGING THE GAPS**

**BETWEEN INDIVIDUAL  
APPLICATIONS IS A  
KEY ELEMENT OF  
DIGITISATION,,**

## BENEFITS OF DIGITISED BUSINESS PROCESSES

Digitising your business is an easy way to achieve operational benefits. But it pays to focus on processes and workflows, and not only digitise them, but reinvent them when relevant. The removal of content silos is a prerequisite for increased efficiency.

Simply put, empowering employees to quickly and easily locate the exact content they need, regardless of which business application it resides in, leads to better decisions, faster results and improved collaboration, which in turn helps you improve the customer experience.



**ACCURACY**



**CONSISTENCY**



**AUDIT TRAIL**



**PRODUCTIVITY**



**ELASTICITY  
FLEXIBILITY**



**STAFF RETENTION**



**RELIABILITY**



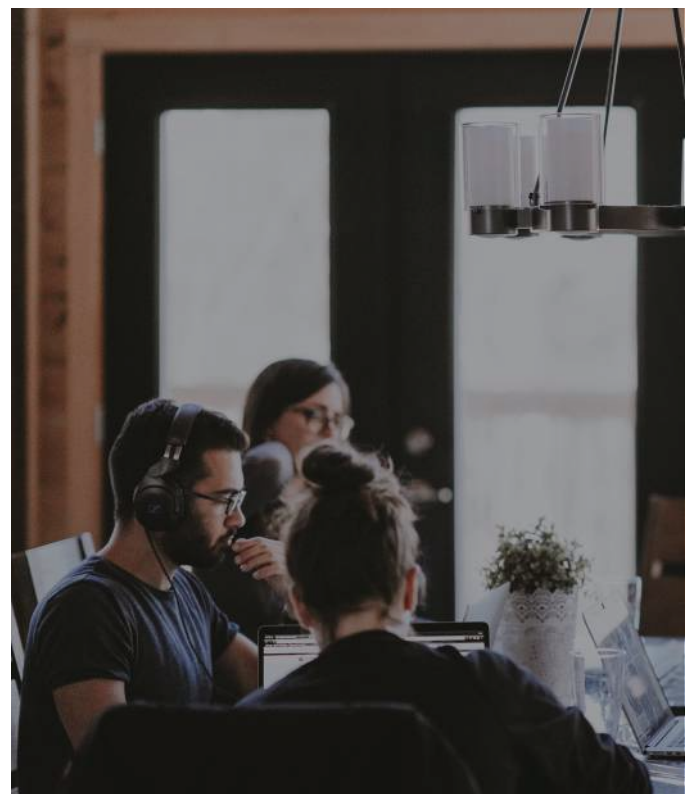
**“RIGHT SHORING”**

*Source: Ernst & Young*

## MANUAL WORK AS THE BARRIER TO MORE EFFICIENCY

Businesses today are inundated with information — including content created internally as well as documents and files received from customers, partners and suppliers. Without an information management framework, time is wasted searching through file folders and various disconnected business systems for critical documents. This is often compounded by the proliferation of multiple versions of the same file, which results in errors and repeated work.

The usage and archiving of information can be more efficient by automating user and access rights, information categorisation, version control and archival. Additionally, the inefficiencies of manual work can be removed by automating information workflows that support business processes. Manual work takes time, creates costs and is prone to human error.



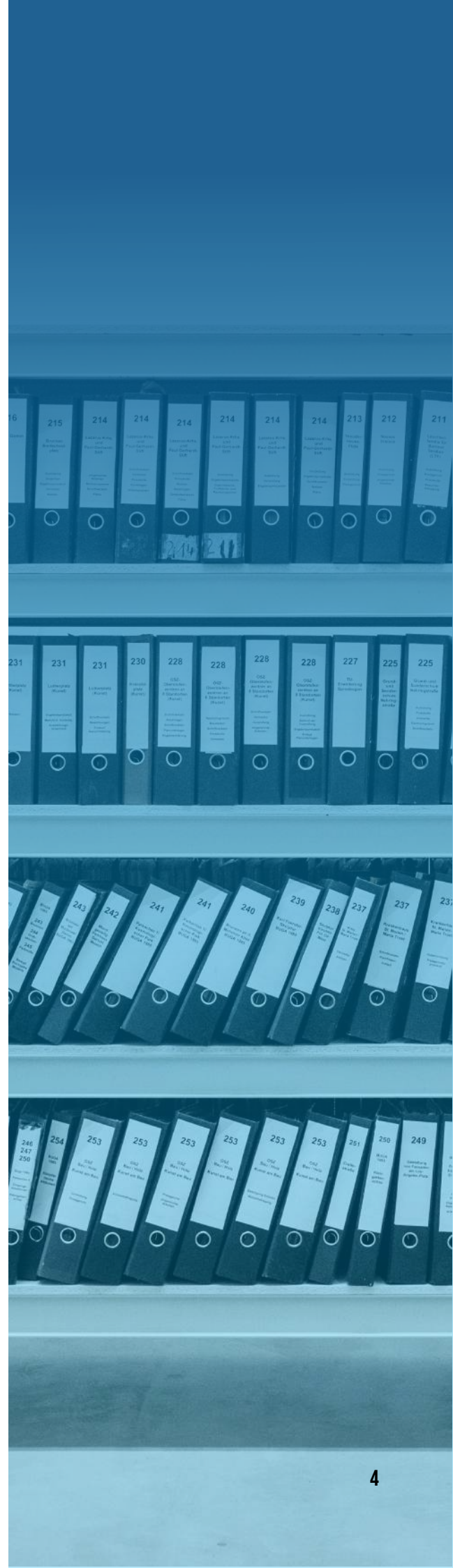


## ORGANISATIONS ARE STILL BOGGED DOWN WITH SILOED SYSTEMS AND ERROR-PRONE MANUAL PROCESSES.

According to Forrester<sup>(2)</sup>, organisations are still bogged down with siloed systems and human-driven processes.

It is very human to stick to familiar ways of working. Therefore, information, and how to access information, need to support the change of employee behavior. This behavior change is a vital element of any potential business transformation. Employees will only accept new ways of working if they understand the need for change and feel involved in the change. Additionally, the systems used to digitise business need to be easy to use. This will enable the employees to embrace new ways of working.

By removing these barriers and silos, there is more potential for increased productivity, improved regulatory and legal compliance and improved customer experience.



<sup>(2)</sup> Forrester- "The Growing Importance of Process to Digital Transformation" - May 8, 2018

# THE **3** KEYS



**METADATA DRIVEN**



**SYSTEM AND  
REPOSITORY NEUTRAL**



**INTELLIGENT**

## THE THREE KEYS TO MORE EFFICIENT INFORMATION MANAGEMENT AND BUSINESS PROCESSES

To successfully automate and digitise business, information management needs to be metadata driven, system and repository neutral, and intelligent.

### FIND CONTENT IN CONTEXT

Metadata allows employees to use content in the context that is relevant to them. It no longer matters where the information is stored; they just need to know what it is they are looking for: an agreement related to new office space, an offer for a customer, a project plan for intranet renewal, or whatever it is they need.

### CONNECT SEPARATE INFORMATION SILOS

Information is typically stored in several content management systems, business applications, and legacy repositories. According to an AIIM study<sup>(3)</sup>, over half of all companies use three or more separate content management systems. Yet, over half of all content remains outside those content management systems. Therefore, it is vital to find, access and manage information across systems and repositories, without costly migration.

### REMOVE HUMAN ERROR AND HELP WITH COMPLIANCE

Artificial intelligence and machine learning go a long way in improving the efficiency of many manual operations. Automatic information tagging with metadata helps remove human error. The ability to crawl through huge amounts of data and recognise patterns in it are paramount to adhering with regulations like GDPR related to Personally Identifiable Information (PII data) and how to manage it.

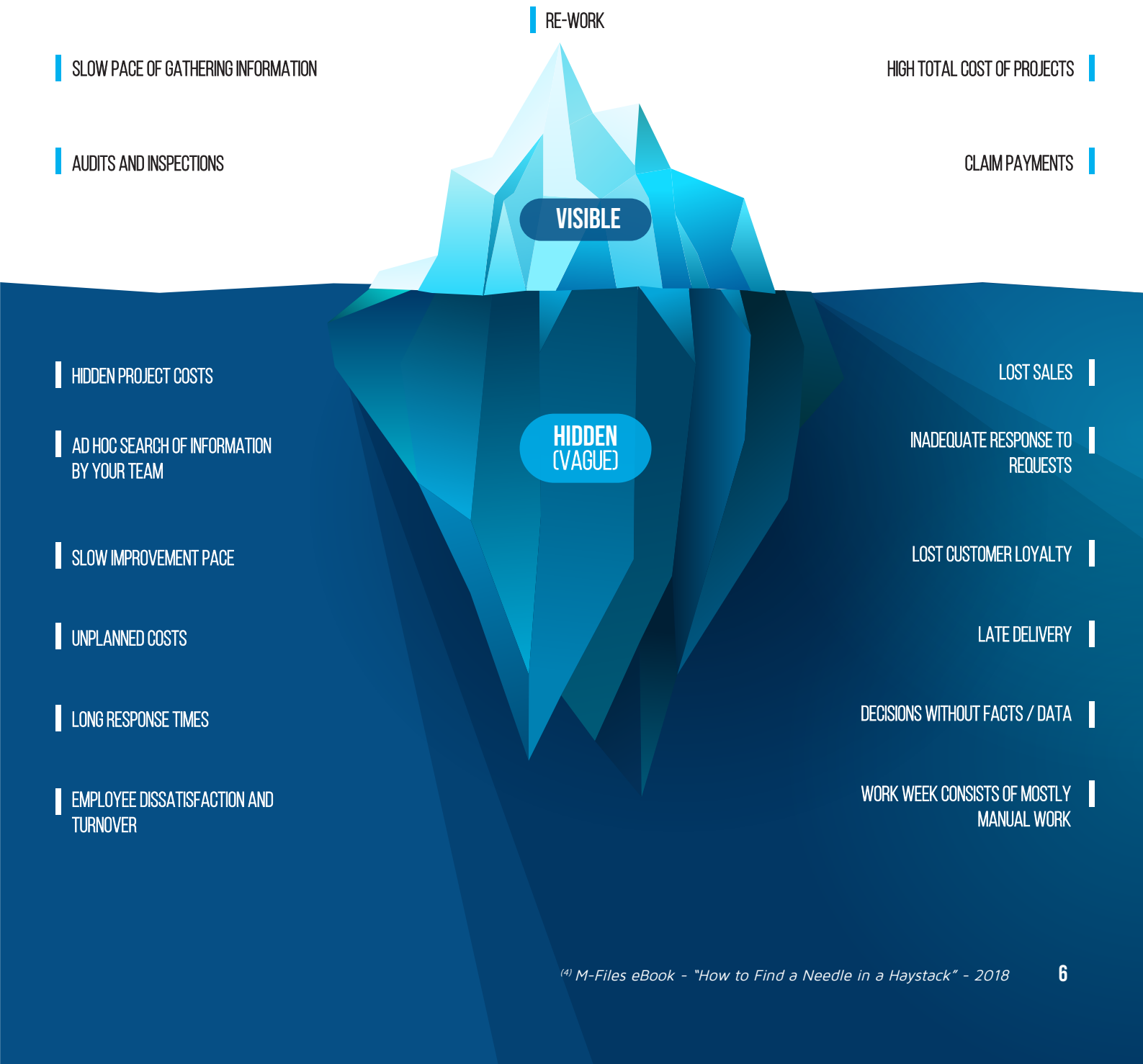
<sup>(3)</sup> AIIM Ebook - "The State of Intelligent Information Management" - 2018

## RECOGNISE THE POTENTIAL FOR MORE EFFICIENCY

The exploding amount of information easily leads to chaos, silos and inefficiency. With the amount of organisation doubling every 1.2 years <sup>(4)</sup>, it is no wonder the inefficiencies can remain hidden. With the right tools, however, information can be turned into an asset and used efficiently for decision-making.

The consequences of hidden information and inefficient ways of working affect the organisation on many levels.

### WHY IS IT HARD TO SEE INEFFICIENT WAYS OF WORKING WITH INSUFFICIENT TOOLS





Organisations typically need to use several different solutions for different departments, processes and tasks. These single-purpose systems are usually unable to communicate with each other resulting in manual work and poor usability.

Data Forge enables your other systems to communicate, so you can find what you need from wherever you are. The platform integrates tightly with existing CRM, ERP and other business systems so that every bit of information you need is in one place.

Automated workflows are powered by artificial intelligence to help you manage business processes efficiently.

The platform is versatile, yet easy to use, and includes both ready-made solution templates for typical use cases as well as the ability to customise it your specific needs.



**Create the business logic and structure you need by using the platform capabilities and the help of Data Forge specialists.**



**Use the ready-made, best practice modules to solve business needs quickly and efficiently.**

Data Forge consolidates multiple applications into a single capable platform that offers powerful search and information management capabilities across core systems. And you can flexibly start the implementation with one unit or process at a time.



**DATA FORGE SUPPORTS USE  
CASES ACROSS INDUSTRIES  
AND LETS YOU AUTOMATE  
BUSINESS PROCESSES.**

# LET EMPLOYEES FOCUS ON THEIR CORE TASKS, RATHER THAN ROUTINE DOCUMENT MANAGEMENT

## EFFICIENTLY MANAGE LARGE AMOUNTS OF INFORMATION

— a task previously unattainable by manual means. To illustrate this point, here is an example we have encountered:

A customer of ours had to look for and gather PII data within nine million documents stored in network folder systems. Rather than sifting through all this data manually, M-Files Discovery found 20,000 such documents, and automatically assigned them to a data protection officer for further review. In typical circumstances, an employee might have spent months and years looking for the 0.2% of documents containing PII data and even so, he or she might have missed some items.

### CASE CUSTOMER

**9** **MILLION**  
**DOCUMENTS**  
stored in network  
folder system

**M-FILES  
DISCOVERY  
FOUND**

**20,000**  
documents  
containing PII data

employee spends months  
and years looking for

**0.2%**  
of the  
documents

**USING AI?**



**35%** **SAID**  
**YES!**

## FIND THE RELEVANT INFORMATION MORE EFFICIENTLY

35% of interviewees commented that they are either using or could be using AI to automate text analysis for better document categorisation and classification<sup>(5)</sup>.

On average, an information worker spends more than two hours per day searching for documents, and up to two hours per day recreating documents as the correct version cannot be found or has been lost<sup>(6)</sup>. Eliminating the time-wasters related to creating and managing documents would be the equivalent to adding 98 new employees to a 1,000-person company — a huge savings potential allowing employees to focus on more meaningful responsibilities.

**2 HOURS A DAY**

searching old  
documents



creating existing  
documents

<sup>(5)</sup> AIIM: Leveraging Deep Learning & Machine Learning Capabilities - 2019  
<sup>(6)</sup> M-Files Ebook: How to Find a Needle in a Haystack - 2018

## DATA FORGE SUPPORTS ALL BUSINESS PROCESSES

Data Forge, underpinned by M-Files, supports all document-centric business processes. It brings together documents, data, content, workflows and business processes so that you can automate the workflows to support your digital enterprise.



### ENTERPRISE ASSET MANAGEMENT



### CONTRACT MANAGEMENT



### PROJECT MANAGEMENT



### INVOICE ROUTING (AP)



### QUALITY SYSTEMS



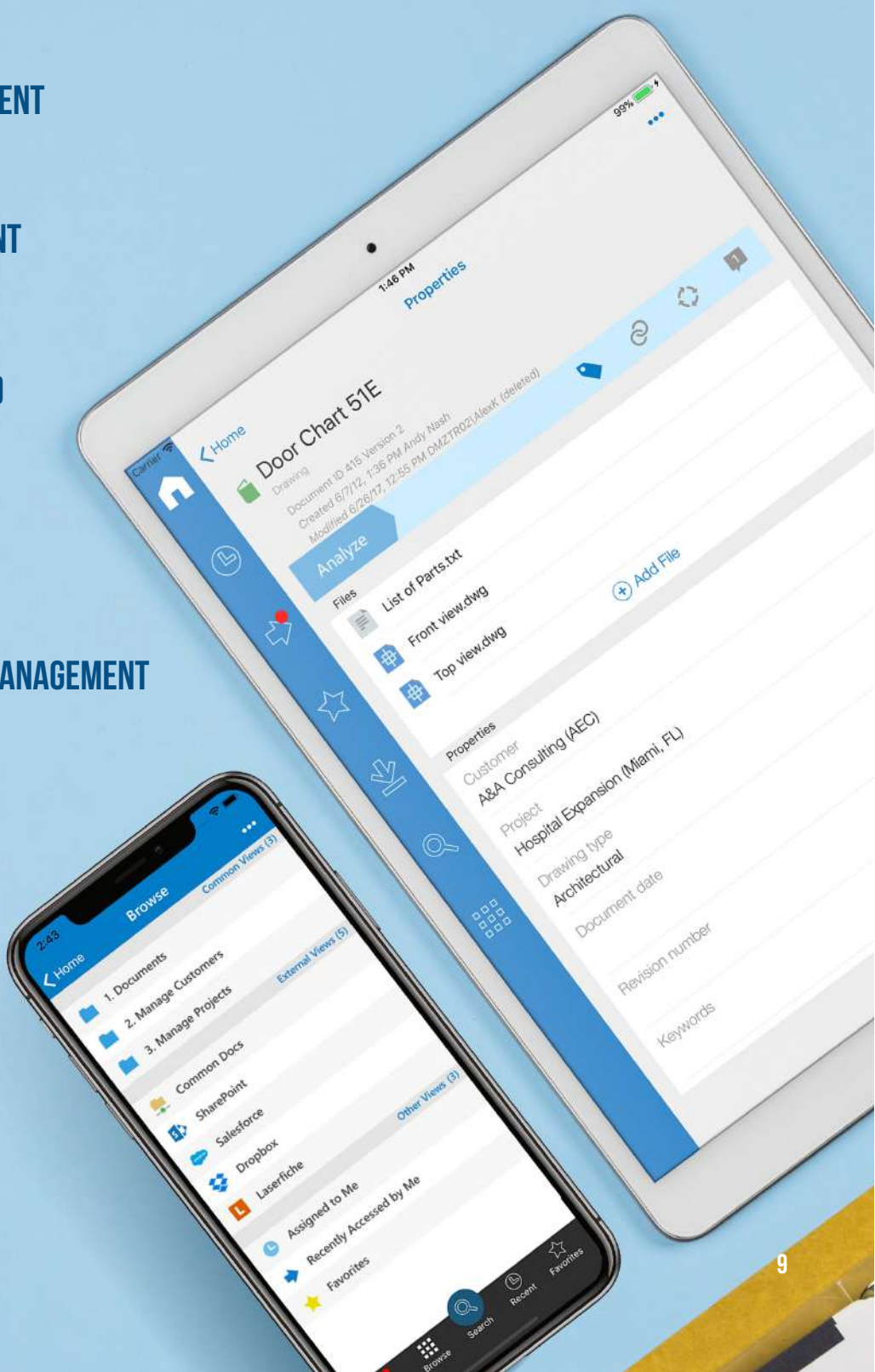
### EMPLOYEE RECORD MANAGEMENT



### RISK MANAGEMENT



### ARCHIVING



## EXAMPLES OF PROCESSES SUPPORTED BY M-FILES



### ACCOUNTS PAYABLE

Manage and process invoices, receipts, purchase orders, financial statements and tax documents to increase operational efficiencies and minimise risk.



### CONTRACT LIFECYCLE MANAGEMENT

Securely keep contracts organized and make sure the right people have fast access to the right version of any contract from any place or from any device.



### DOCUMENT MANAGEMENT

Enable users to instantly access files from any device, while ensuring version control and avoiding duplication of content.



### ENTERPRISE CONTENT MANAGEMENT

Manage all your business content regardless of the format or origin of the content. Turn unmanaged data into manageable data in a matter of minutes.



### HUMAN RESOURCES

Manage and track recruitment, training, performance appraisals, payroll and benefits to maximise operational efficiencies and knowledge. Protect sensitive information with automated permissions.



### QUALITY AND COMPLIANCE

Companies in highly-regulated industries can manage audit processes, standard operating procedures (SOPs), non-conformance reports, as well as corrective and preventative actions (CAPAs).



### PROJECT DOCUMENT MANAGEMENT

Define simple rules for content visibility, task deadlines and ownership to streamline the entire project management process.



### RECORDS MANAGEMENT

Manage records from the point they are conceived to their eventual archival and disposal.



### SALES AND MARKETING AUTOMATION

Integrate with existing CRM to create a connection to critical content like proposals, presentations, contracts, POs, invoices, quotes and email.



### TRAINING

Manage staff learning requirements, certifications and other training tasks to track and report on training.



### INVOICE PROCESSING

Automate and track the review and approval of invoices as well as other financial business processes to ensure invoices are paid on time.



## EXAMPLE USE CASE

### AUTOMATING CONTRACT MANAGEMENT TO IMPROVE SALES PERFORMANCE

When it comes to sales performance, reducing the amount of time it takes to negotiate, review and close contracts is critical. Yet manually creating, approving, and signing a new contract is a tedious process. These slow manual processes create bottlenecks, especially at the end of the month or quarter, that can lead to pushed or even lost deals.

#### AUTOMATION CAN HELP

Automating contract management increases efficiency and streamlines processes. Workflows seamlessly move contracts through their lifecycle and consistently keep staff updated on new tasks using notifications and assignments (i.e. pending signatures).

#### MANUAL CONTRACT MANAGEMENT

Sales and legal have to reinvent the wheel with every new contract, which can lead to disparity between contracts, potential rogue contracting, the possibility of human error and oversight, and slow contract creation times.

During drafting and negotiation, those responsible have to keep up with various versions passed through email inboxes and shared drives. This is difficult and can cause confusion and uncertainty during the negotiation process.

Once drafted, those responsible have to be made aware of their responsibilities. This is often done through email, which can result in version control issues and tasks being overlooked.

Once approved, physical signatures can add hours, if not days to the contract creation process. Parties have to either print and scan documents, which can cause versioning issues. Or they have to arrange for parties to physically come together to sign the document.

#### AUTOMATED CONTRACT MANAGEMENT

Sales and legal can create contracts from a library of approved templates. This not only improves consistency, but it also reduces risk and the amount of time it takes to create a new contract.

During the drafting and negotiation process, drafts are automatically version controlled. Collaborate easily and securely with external parties using deep integration into Outlook and first class comparison tools.

Those responsible for reviewing and approving the contract are automatically assigned and made aware of their responsibilities. Flexible review and approval workflows make it easy to approve a contract or reject and send it back to sender.

Once approved, e-signature applications allow all parties to sign and enact the contract using any mobile device. This expedites the signature stage significantly without any versioning chaos.

#### CREATION

#### DRAFT & NEGOTIATE

#### REVIEW & APPROVE

#### SIGN & ENACT

FROM THE MOMENT THE CONTRACT IS CREATED TO THE MOMENT IT'S SIGNED AND ENACTED, AUTOMATED MANAGEMENT SYSTEMS CAN SHED DAYS IF NOT WEEKS OFF THE CONTRACT CREATION CYCLE.

## USE DATA FORGETO MANAGE ALL OF YOUR BUSINESS PROCESSES

The versatile Data Forge platform supports the needs of all businesses — regardless of their size, industry or use case.

Solution templates and best practices across several industries are offered to help you build your own intelligent information management solution, since you don't need to build vault structure and workflows from scratch.

Alternatively, you can configure the platform to your business requirements as the platform is highly configurable.

In addition to the generally available best practices and use cases, you can configure Data Forge to support your specific business requirements and use third-party add-ins to configure the platform even further.

### CUSTOMER SERVICE

Product and project archive  
After sales materials  
Customer claims and feedback

### MANAGEMENT

Meetings and Agendas  
Access control and notify  
Reporting  
Quality documents

### PROCUREMENT

Supplier management  
Supplier claims and feedback  
Contracts

### FINANCE

Fiscal year/ period materials  
Archive solutions  
Budget materials  
Material reviews  
Report data

### PLANNING PRODUCT DEVELOPMENT

Project information  
Product materials  
Feedback and Initiative

### SALES & MARKETING

Sales and product materials  
Tender approvals and versioning  
Customer claims and feedbacks  
Contracts

### HUMAN RESOURCES

HR Documents  
Employee records  
Recruiting  
Competence management

### PRODUCTION & OPERATION

Project information  
Equipment data  
Supplier claims  
HSE Records

### QUALITY

Quality documents  
Training  
Audits  
Company permits  
Internal deviations  
CAPA  
Risk management  
Process diagrams



Dedicated or “best-of-breed” solutions address the changes in market effectively, however they approach new challenges department by department, and they are limited in scope. Intelligent Information Management that spans across all systems, applications and content repositories provides a single, centralised solution to benefit the whole organisation.

AI-driven workflows support business processes, ensure quality and promote consistent levels of service. Streamlining workflows related to document-intensive business processes creates efficiencies across accounting, HR, legal, production, marketing and customer service teams, improving the speed at which business is conducted, and enhancing customer experience.

## ABOUT DATA FORGE

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**Data Forge is underpinned by M-Files, a next-generation intelligent information management platform that improves business performance by helping people find and use information more effectively.**

Unlike traditional enterprise content management (ECM) systems or content services platforms, M-Files unifies systems, data and content across the organisation without disturbing existing systems and processes or requiring data migration. Using artificial intelligence (AI) technologies in its unique Intelligent Metadata Layer, M-Files breaks down silos by delivering an in-context experience for accessing and leveraging information that resides in any system and repository, including network folders, SharePoint, file sharing services, ECM systems, CRM, ERP and other business systems and repositories. Thousands of organisations in more than 100 countries use M-Files for managing their business information and processes.

For more information, visit [www.iim.stratas.solutions](http://www.iim.stratas.solutions)

## GET IN TOUCH

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