



Taming the Paper Tiger

Agenda



1. Introduction and opening remarks
2. Benefits and costs of paper
3. Methodology for improvement
4. Two workflow examples
 1. AS-IS (Current State)
 2. TO-BE (Future State)
5. Costing and building a business case
6. Useful Tools

What's good about paper?

Before talking about what challenges paper imposes and what are the costs, let's take a few minutes to discuss why we use paper.

What's good about paper?

1. It's easy
2. It's quick
3. No configuration, software, integration needed
4. Minimal training
5. It's what we've always used
6. It seems cheap / no capital budgeting required

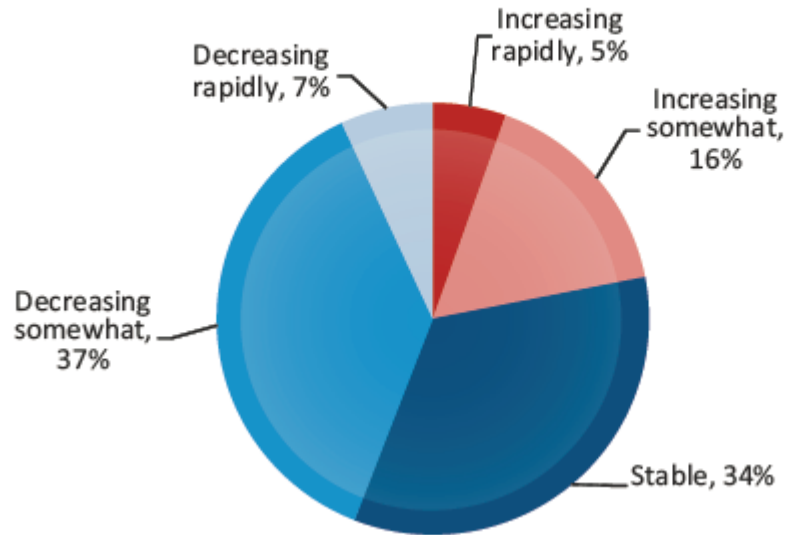
What's bad about paper?

What's bad about paper?

1. You must plan how to manage it: store, manage, control access, destroy report on
2. Can't be shared
3. Key information needed for decision making is “hidden”
4. Metrics based improvement difficult
5. These apply to “paper-like substitutes”
 1. Outlook inboxes, spreadsheets, shared drives, non-indexed images

Cross-industry paper highlights

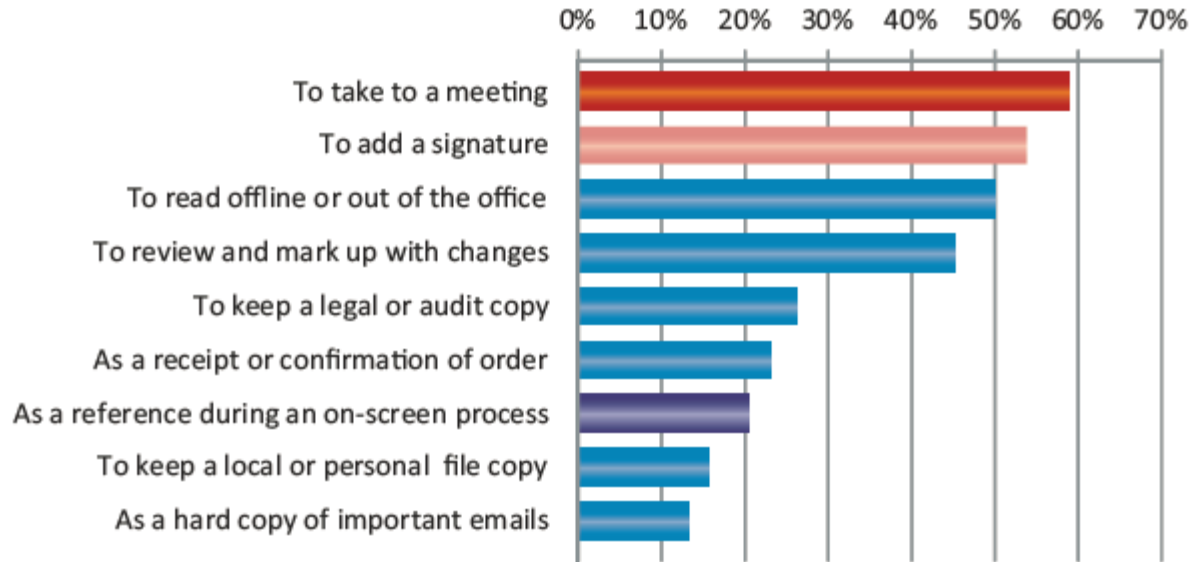
: Would you say that the consumption of paper and/or number of photocopies in your organization is? (N=362)



Source: Paper Wars 2014, AIIM

Cross-industry paper highlights

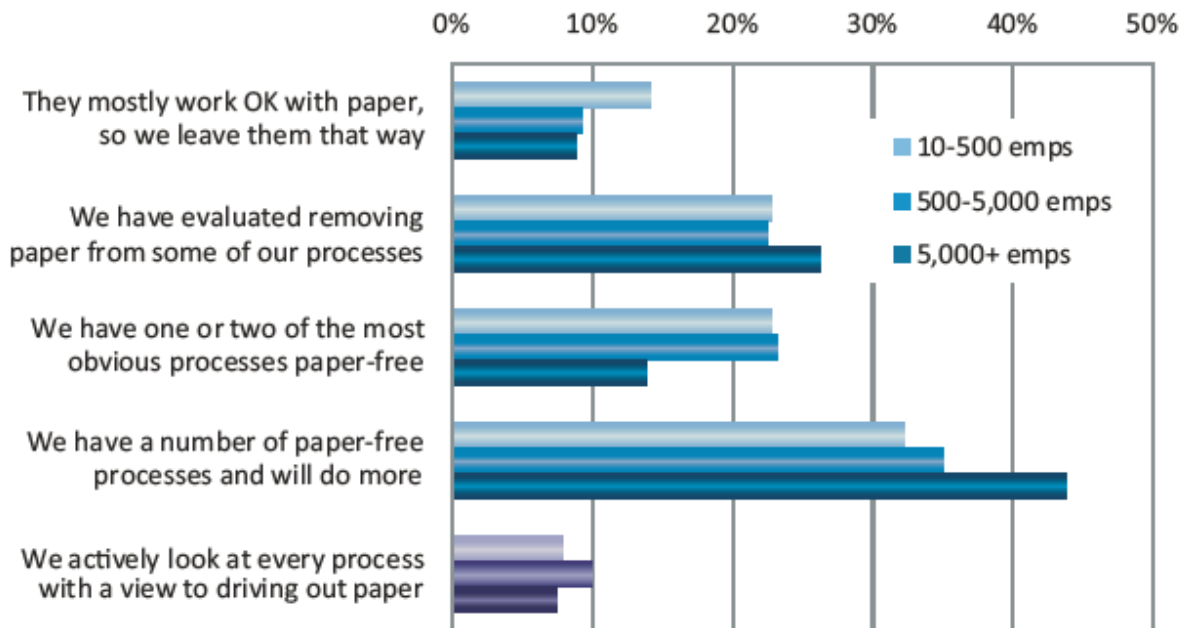
For which of the following purposes do you personally resort to printing paper copies? (N=357)



Source: Paper Wars 2014, AIIM

Cross-industry paper highlights

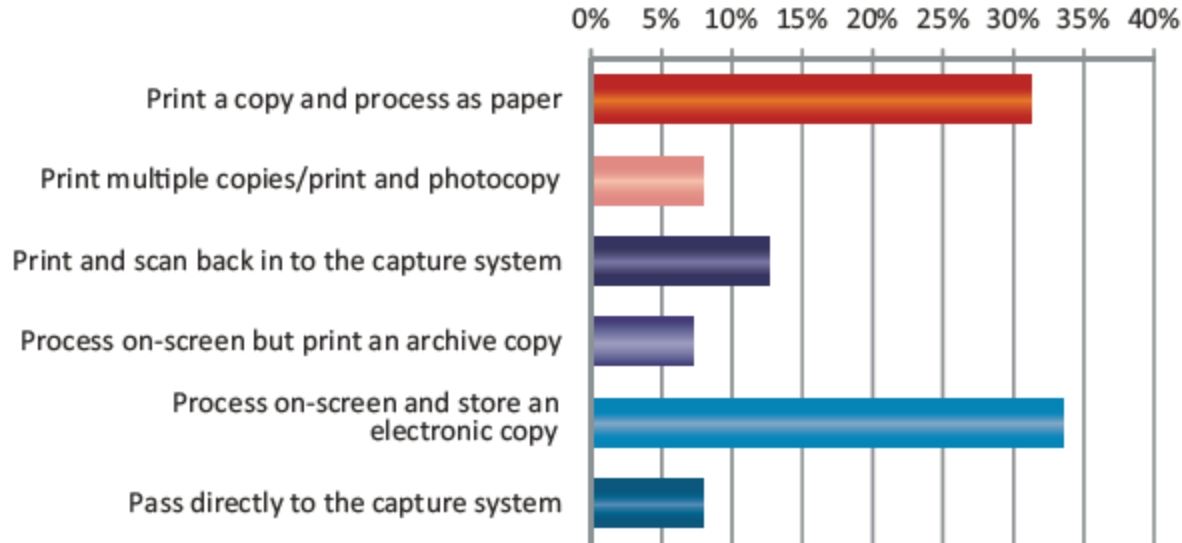
How would you describe your progress towards eliminating paper from your business processes? (N=358)



Source: Paper Wars 2014, AIIM

Cross-industry paper highlights

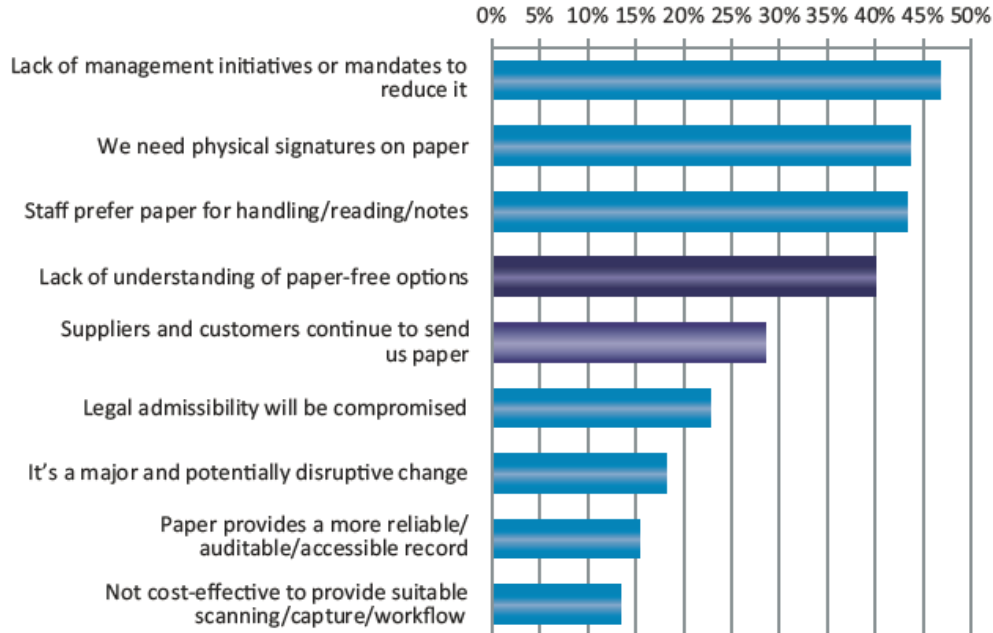
How do you generally deal with invoices, purchase orders and forms that arrive as PDF attachments to emails? (N=291)



Source: Paper Wars 2014, AIIM

Cross-industry paper highlights

*Why do you think there is still paper in so many of your business processes?
(Max THREE) (N=325)*



Source: Paper Wars 2014, AIIM

Cross-industry paper highlights

The arguments for keeping electronic records to save office space, improve findability and reduce waste are well rehearsed, and yet billions of unnecessary paper copies are still printed around the world everyday. Meanwhile, we have moved on to another battlefield – paper-free processes. This presents a more resounding rallying cry for the corporate troops. Let's join forces across the enterprise and fight for **paperfree processes**, rather than pursue that seemingly elusive **paperless office**.

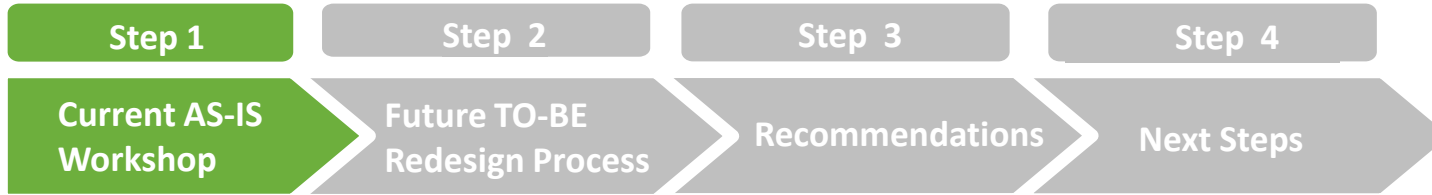
- Paper Wars 2014, AIIM

Xerox Business Process Methodology



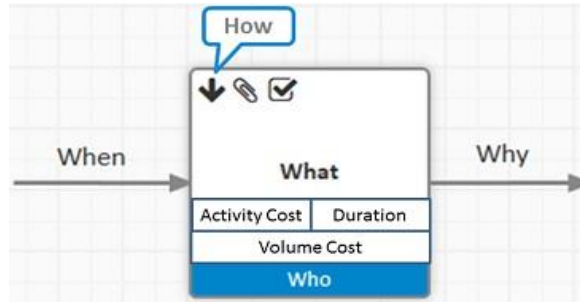
- Standardized, teachable, repeatable and lightweight improvement methodology
- Understood by all stakeholders -- Easy to read business friendly notation
- Single view of how business operates for all stakeholders
- Based on live, real time process capture and validation workshops

Current (AS-IS) Workshop



- Capture Processes Participants:

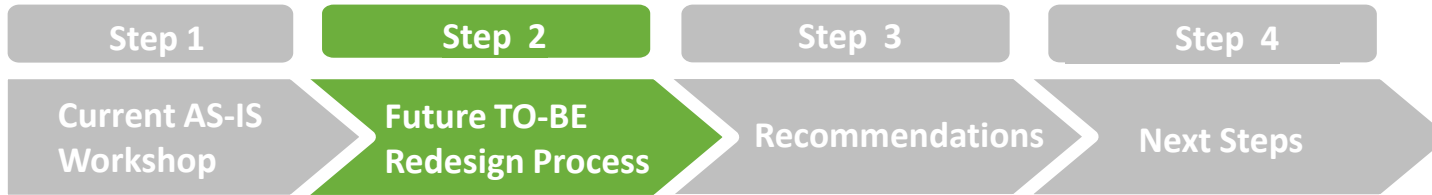
- Session Leaders
 - Facilitator
 - Process Author
- Client Participants
 - SME's
 - Process Owner
 - Process Managers



- Capture Activity:

- What is done
- Who does it and what systems used
- Durations, volumes and costs
- Pains and business requirements
- Receive agreement/validation

Future (TO-BE) Redesign Process



- Identify what's done well
- Identify opportunities for improvement
 - Streamline work processes
 - Address pain points and frustrations
 - Apply Best Practices to fully maximize system and workflow benefit
- Provide vision of how it could be
- Demonstrate Cost savings/ROI



Next Steps



Recommendations:

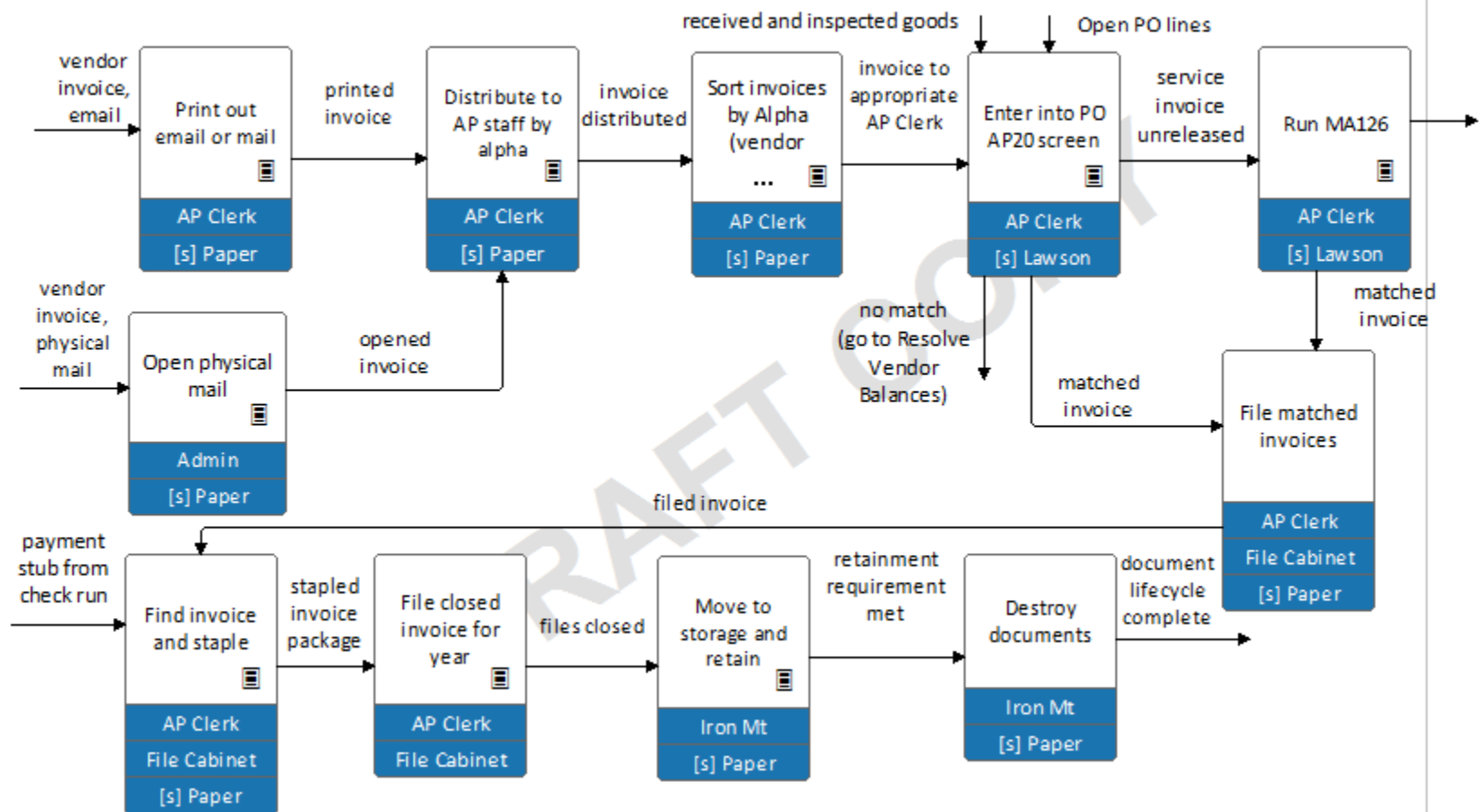
- Detailed findings and recommendations for changes are documented and presented to Stakeholders
- Processes working well are highlighted

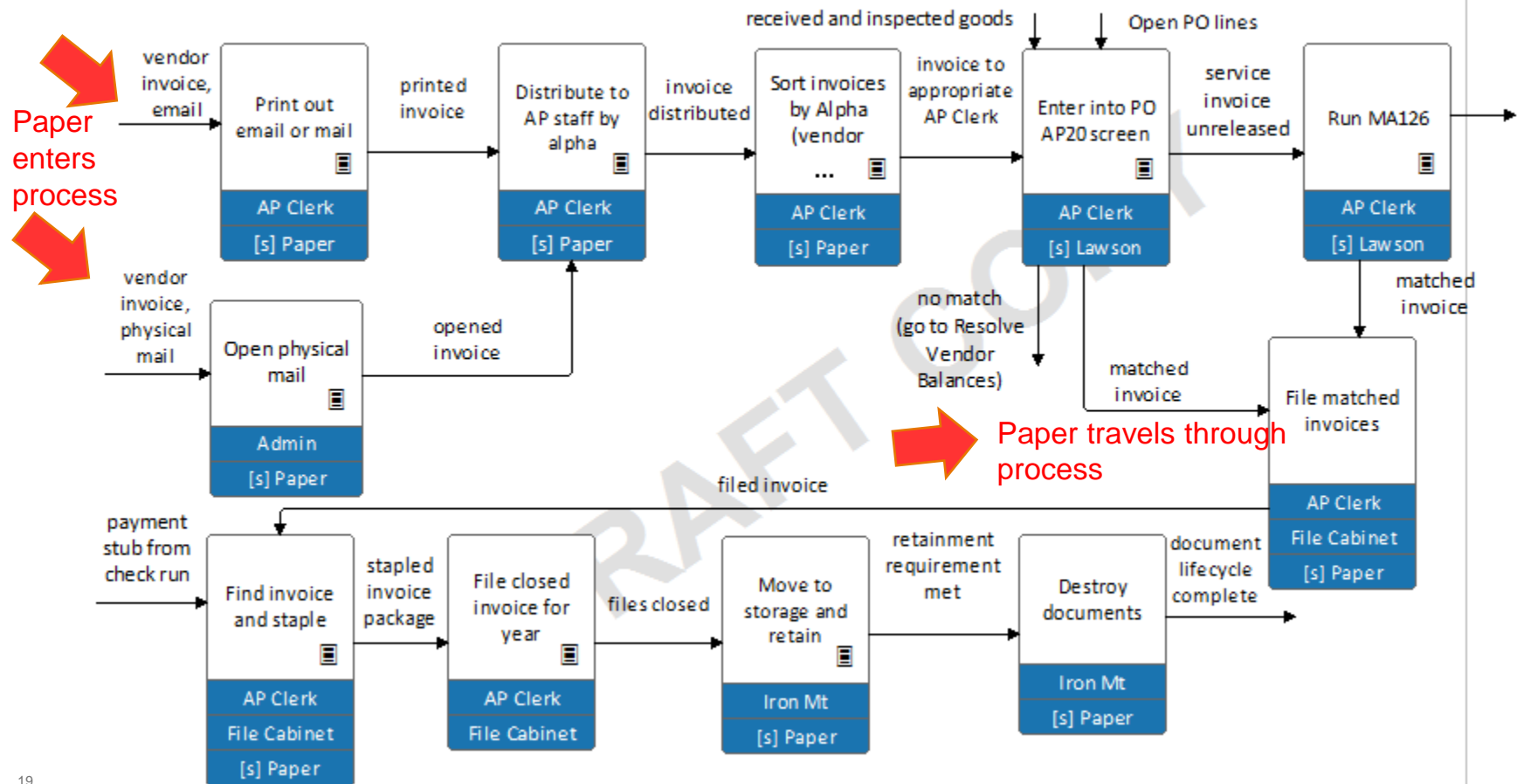
Next Steps:

- Next steps to complete recommendations are outlined
- Review of other areas that may benefit from the Xerox Business Process Assessment

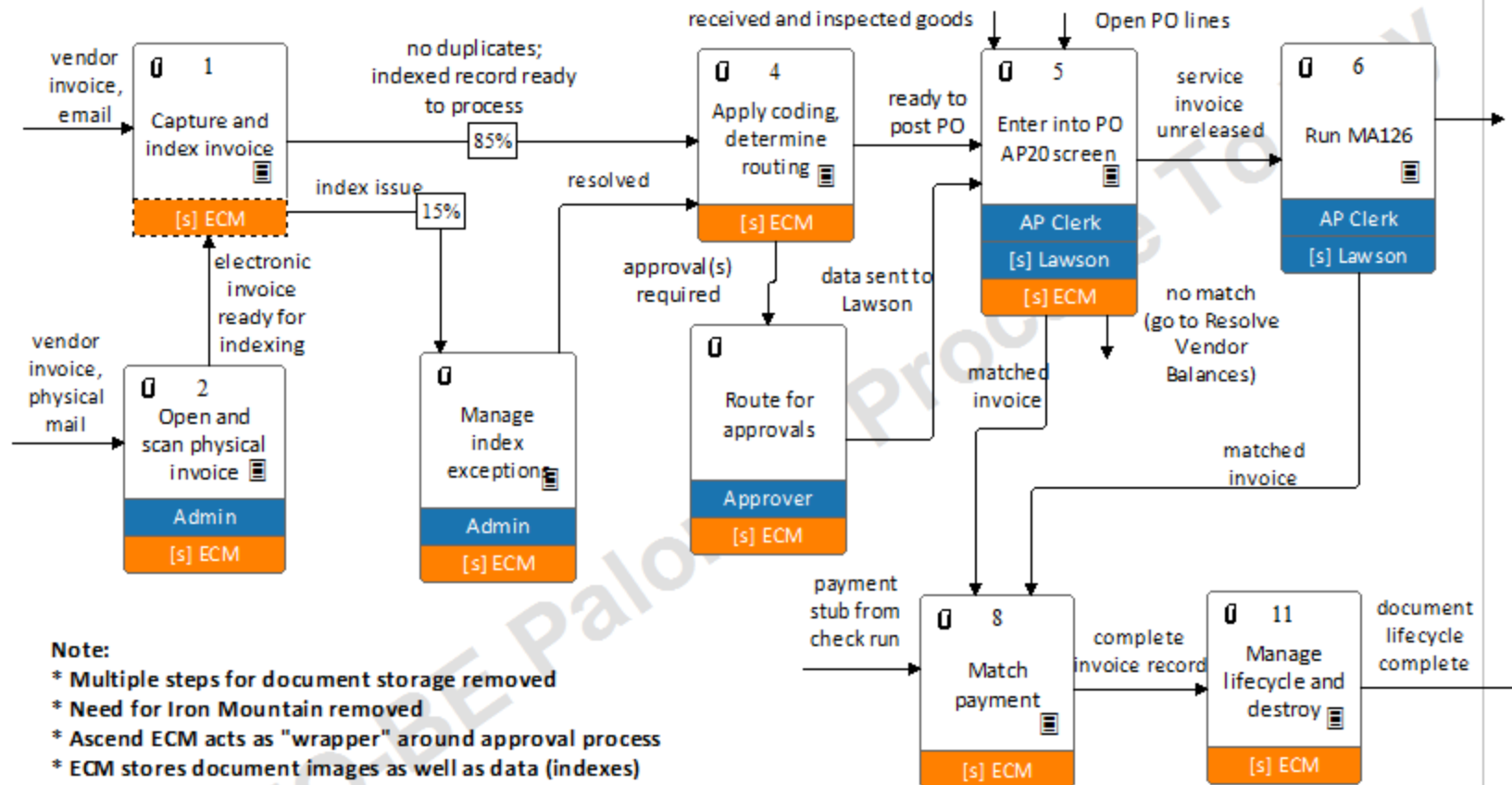
BPI Example #1: Remove paper with ECM

Procure to Pay: Invoice Processing





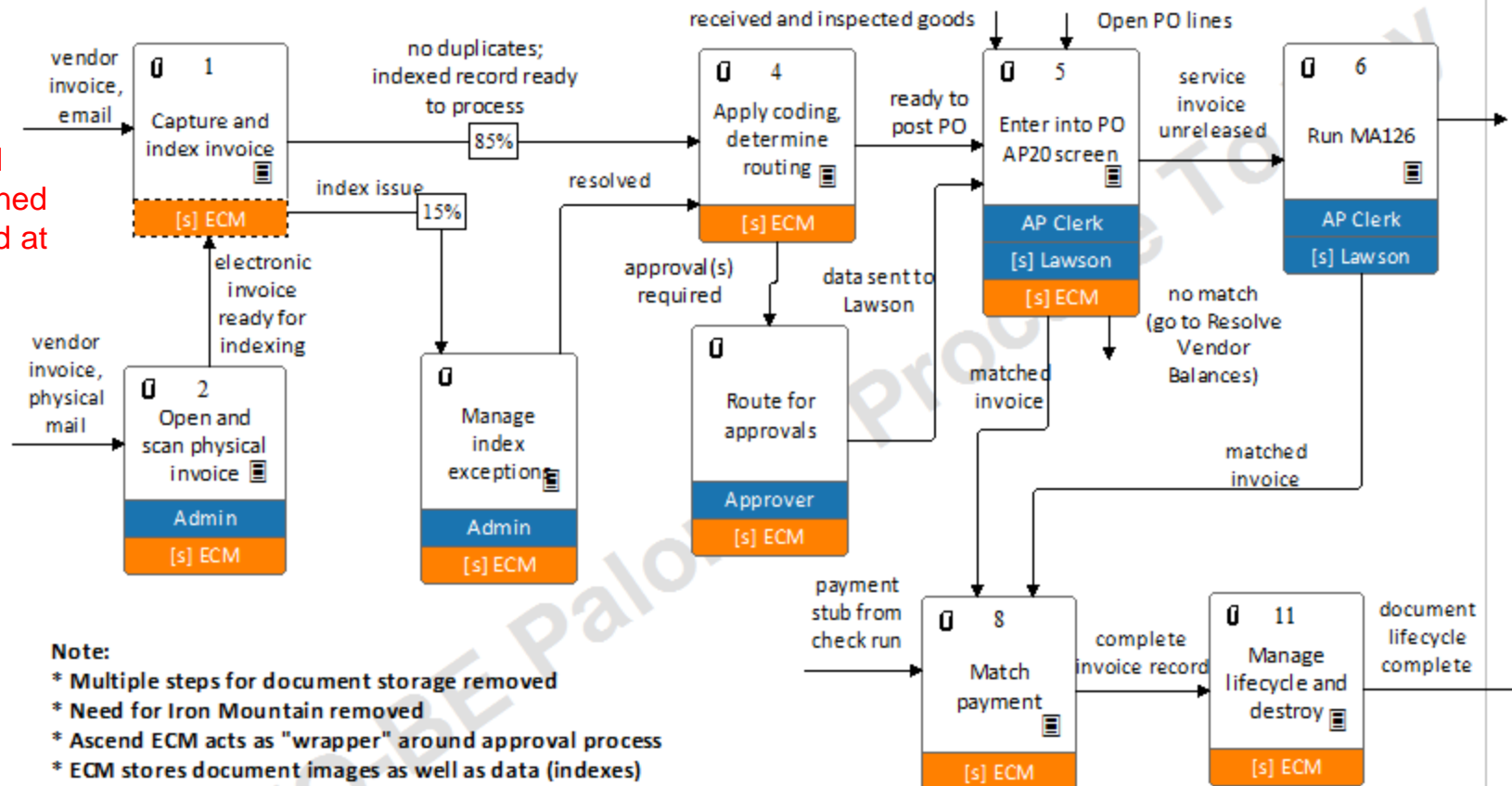
TO-BE workflow of same process with ECM



Note:

- * Multiple steps for document storage removed
- * Need for Iron Mountain removed
- * Ascend ECM acts as "wrapper" around approval process
- * ECM stores document images as well as data (indexes)
- * removes need for clerks to manage via email inbox

Paper and data scanned and indexed at start of process



Note:

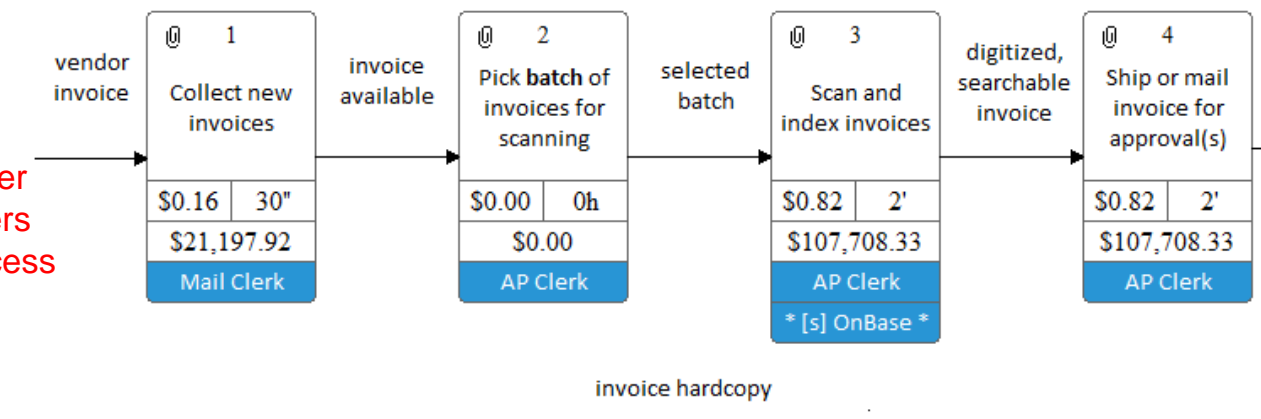
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BPI Example #2: Reducing costs and backlog by implementing a blended ECM solution

Manage vendor invoices



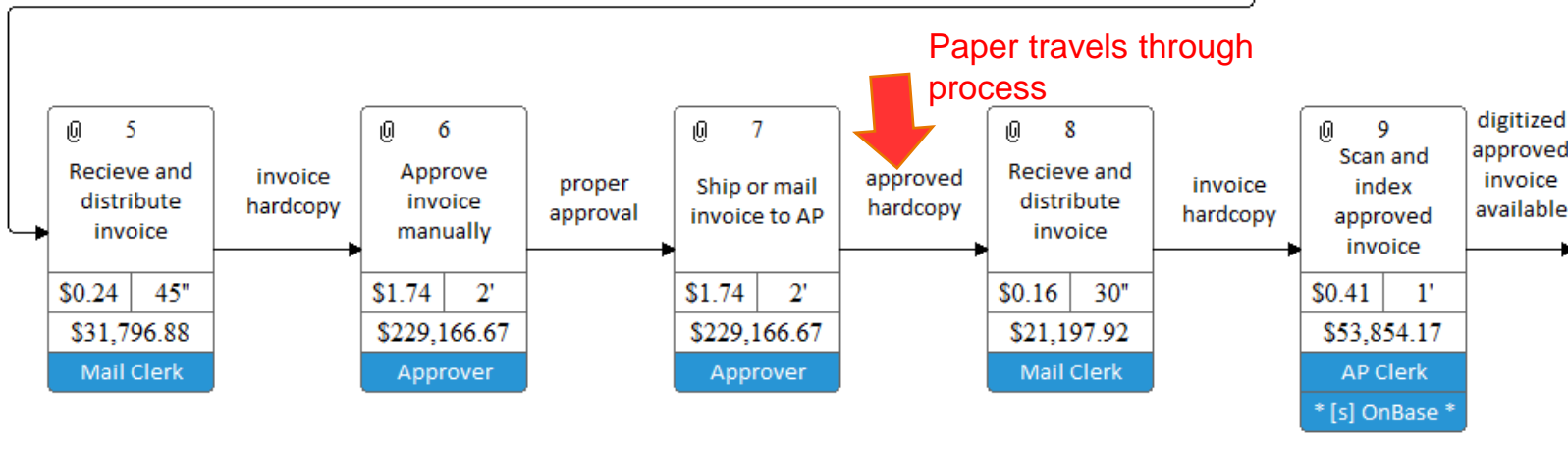
Paper enters process



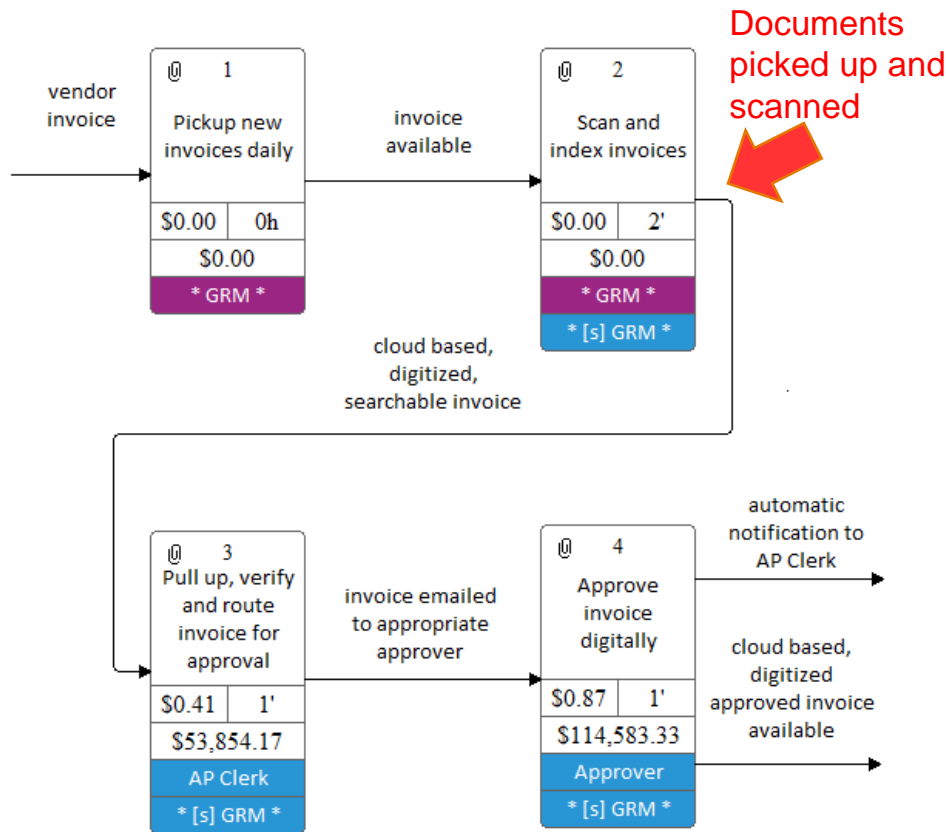
AS-IS Performance

- Steps: 9
- FTE: 12
- Labor: \$804,000
- Mail: \$136,000
- Total: \$940,000

Paper travels through process



TO-BE workflow of same process with blended ECM solution on the front end



TO-BE Performance
• Steps: 4
• Outsourced: 2
• Internal: 2
• FTE: 2.3
• Labor: \$169,000
• Mail: \$0
• Total: \$169,000

Reductions and Savings
• Steps: -5
• Internal Steps: -7
• FTE: -9
• Labor: -\$665,000
• Mail: -\$136,000
• Total: -\$771,000

Useful Tools

1. Universal Process Notation (UPN)

1. Clear, quick, business friendly process language

2. UPN Mapping Tools

1. Q9 Elements (free, cloud-based)
2. TIBCO Nimbus / TIBCO Nimbus Maps
3. Microsoft Visio (if used correctly)



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