

# Digital Transformation

## The rise of document management opportunities

by: Brent Hoskins, Office Technology Magazine

In recent months, office technology dealerships — particularly those more significantly impacted by the challenges presented by the COVID-19 pandemic — have focused on, among others, these key goals: recouping lost revenue and identifying new ways to maintain their status as trusted technology advisors. As it turns out, to some degree, those goals are being achieved as a direct result of the rise in remote workers.

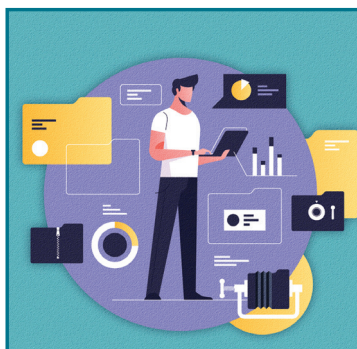
Looking at those dealerships offering document management (or ECM) solutions in particular, one could say that the growing remote workforce has presented a silver lining in an otherwise difficult business climate. It appears that the need for remote access to files, management of workflow, etc., is driving what is often referred to as digital transformation.

Yes, says Jim Roberts, president of DocuWare Corp., a provider of document management and automated workflow solutions, the pandemic has resulted in many companies now pursuing digital transformation. “There are a lot of companies that are being forced into remote work situations and needing cloud solutions,” he says. “Primarily they need to give workers immediate and secure access to data and to ensure business continuity.”

DocuWare is seeing “tremendous urgency” in the marketplace that did not exist prior to the pandemic, Roberts says. “Businesses need to quickly digitize, index and access information so they can maintain core business processes,” he says. “We consider ourselves very fortunate to be in a position to help.”

Although most enterprise customers have already selected and implemented document management solutions, many SMB companies have not, Roberts says. “That’s where the acceleration is kicking in,” he says. “The timing is perfect for a new dealer to jump into the space.”

Stephen Young, president and CEO of Square 9 Softworks, offering a variety of document management and document capture automation solutions, shares a similar perspective.



“It’s a new focus for many companies; they’re committing their budgets and their resources toward changing the way they work,” he says. “We’re seeing this all the time now. For most organizations, change can’t be justified until there is a strong business case, and the COVID-19 pandemic acted as a catalyst for many organizations to say, ‘You know what, digital transformation isn’t a nice-to-have, it’s a need-to-have.’ That’s the message that we keep getting from our customers and from a lot of our dealers, quite honestly.”

Fortunately, says Hedy Belttary, senior vice president of sales at Laserfiche, a provider of intelligent content management and business process automation solutions, the office technology dealership’s move into offering document management is a “very organic transition.” In fact, “it’s a match made in heaven,” she says, noting that offering document management is simply a continuation of dealerships’ efforts to guide their customers’ digital transformations. “This is the next step for their customers,” she says. “It is a very logical way for dealerships to take their customers to the next step in their business processes and their workflows.”

Selling document management is easier than many dealers may believe, particularly with the rise of cloud-based solutions, Belttary says, emphasizing that even dealerships that are perhaps lacking the necessary staffing for on-premise solutions are “very successful” with Laserfiche’s cloud offering. “With a traditional on-premise solution there are a lot of considerations that need to be factored in prior to the deployment of technology,” she says, adding that the required expertise must come from either technical resources employed by the dealership or the internal IT of the prospective client. “A lot of that is resolved with the cloud. So, the ability to go out there as a salesperson and sell a cloud solution is now much faster and much more doable than having to always resort to the technical support system.”

The rise in the number of remote workers is driving a new level of demand for cloud-based solutions, Young says,

noting that Square 9's move earlier this year to make its entire portfolio available in the cloud is paying off significantly. "Many people are saying, 'Look, I'm not in the office to support or manage a system. I want that ease of use in the cloud,'" he says. "We've seen a definite increased demand for ECM for remote access [via the cloud] as companies have realized this is a key part of their business continuity plans."

Cloud availability of its entire portfolio is not the only recent stride at Square 9. "About a year ago, we introduced something that we call the Square 9 Solutions Delivery Network," Young says. "This is a cloud-hosted library of pre-designed [downloadable] applications that we built on our GlobalSearch platform. If a customer says, 'I'm struggling with managing my signed delivery tickets,' we've got a solution for that. Or, if the customer says, 'I'd like to put in a two-tier invoice approval process,' no problem, we've got that, and it's already prebuilt. So, by standardizing and simplifying solution delivery, we've taken away a lot of the reasons why dealers haven't had success in selling ECM before. It's no more of that blank canvas, 'Here, go figure it out.'"

More recently, Square 9 began offering Return-to-Work Essentials, built on the GlobalForms platform. "This uses our forms product in a touchless, mobile way, allowing a person entering a facility to use a mobile phone to scan a QR code, which then displays a series of health screening questions on the phone," he says, noting that the person can also input his (or her) current temperature, once taken. "We've had huge success with this. We've implemented it in a number of nursing homes and school systems. It's been a very strong new product offering."

Similarly, among the new strides at DocuWare (which also offers cloud-based solutions), is the company's new contactless screening e-form, allowing the screening of employees returning to work, Roberts says. "With screening now mandatory in most states, this e-form is growing in popularity with customers," he says. "Adding this functionality to a new or existing system is a quick and easy way for dealers to sell and earn more."

Other new strides at DocuWare include its electronic signature service, single sign-on and multifactor authentication, providing added security and convenience that have "allowed dealers to enhance their customers' existing DocuWare solutions and profit from the additional work," Roberts

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— Jim Roberts  
DocuWare Corp.

says. He notes that the e-signature offering has been particularly well received during the pandemic. "The ability to process contracts and so forth when many people are working in their home offices is enhanced and made possible through e-signature processes."

In terms of new strides at Laserfiche, Belttary touts the "exciting components and functionality" that have

taken the company's cloud offering to the "next level," such as intelligent capture and invoice processing. "We call it Smart Invoice Capture, which gives users the ability to capture information in a fluid way, regardless of where it's located on the page; so, not necessarily relying on structured content to be able to capture information for indexing purposes and processing of invoices," she says. "We also have our new Laserfiche Workflow Bots, which give users the ability to connect with other applications, out of the box, and do away with redundant tasks. These bots conform to how users utilize the document management system in the most intuitive way. In addition, they are easy to configure by users, if needed."

Beyond the recent strides among the solutions providers, dealers only now considering document management will also likely find the level of support and training provided to be appealing. "As a company, we are big believers in empowerment through education," Belttary says. "This is reflected in the comprehensive solution provider training program we offer to get interested parties up and running quickly. Much of this has transitioned over to online and live hands-on labs and sessions. In conjunction with this, new solution providers who are eager to close and implement their first solution can take advantage of outsourced services that we also offer to the channel."

Roberts says DocuWare has a comprehensive program in place to support and work with its dealer network. "Our Authorized DocuWare Partner program is truly a partnership, because both sides have to work equally hard to make it successful," he says. "In the first 90 days, we craft a customized marketing and growth plan for each specific dealership and customer base, and we help them work through that plan. It involves sales and implementation training for dealers, along with certifications they can earn."

The DocuWare training program also includes work on lead generation and customer events to fill the funnel, Roberts adds. "It's also coaching on solution selling, learning how to demonstrate, consult and communicate on the highly

valuable solutions, and how to help customers realize the benefits,” he says. “In addition, there is detailed training on the backside on how to implement and support.”

Young, emphasizing the support Square 9 provides its dealers, shares another perspective. “When we launch new dealers, we’re less focused on teaching them all the ins and outs of our software, because that’s something that we’re experts on,” he says. “We’re there to support them.”

While Square 9 offers a comprehensive e-learning program for dealer training, “we also have a team of business solutions consultants who work nationally with our dealers to help them with demos, to do scoping calls with the customers and to actually help them understand the needs and apply the technology,” Young says. “So, our job is

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Laserfiche



to make dealers look good and provide them with the resources that they need to be successful.”

Looking to the future, dealers considering document management as a means to recoup lost revenue and maintain their status as trusted technology advisors should recognize that “how people are going to work in the future has changed forever,” Belttary

says. “So, I think the more tools we can give people, regardless of where they are working, the better.” ■

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