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Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool by 444 individual members of the AIIM community between Sept 12, and Oct 07, 2014. Invitations to take the survey were sent via e-mail to a selection of the 80,000 AIIM community members.

Survey demographics can be found in Appendix 1. Graphs throughout the report exclude responses from organizations with less than 10 employees, and suppliers of ECM products and services, taking the number of respondents to 366.

About AIIM

AIIM has been an advocate and supporter of information professionals for 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants.

About the Author

Doug Miles is head of the AIIM Market Intelligence Division. He has over 30 years' experience of working with users and vendors across a broad spectrum of IT applications. He was an early pioneer of document management systems for business and engineering applications, and has produced many AIIM survey reports on issues and drivers for Capture, ECM, Information Governance, SharePoint, Mobile, Cloud, Social Business and Big Data. Doug has also worked closely with other enterprise-level IT systems such as ERP, BI and CRM. Doug has an MSc in Communications Engineering and is a member of the IET in the UK.

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Introduction

It feels like we have been fighting the paper wars for a very long time. These days the technological weaponry is cheaper, better, faster. The office troops are mobile, agile and highly computer-literate. The rules of engagement have legitimized scanned copies and digital signatures. Yet, most organizations are still fighting everyday battles with paper that clogs up offices and slows down processes.

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 every day. Meanwhile, we have moved on to another battlefront – paper-free processes. This presents a more resounding rallying cry for the corporate troops. Let's join forces across the enterprise and fight for paper-free processes, rather than pursue that seemingly elusive paperless office.

A very strong case can be made for all-digital processes in improved productivity and lower costs, but the biggest impact is on speed of response - response to inbound mail, response to bottlenecks, response to regulatory changes, but above all, response to the customer, citizen or client. Business-at-the-speed-of-paper is not an appealing maxim and is likely to be completely unacceptable in a few years' time, in what will be an increasingly mobile, remote-working, just-in-time world.

In this report, we take an in-depth look at the amount of paper in the office, the battle plans to remove it, the take up of digital mailrooms and multi-channel capture, and the influence of mobile and cloud. Above all, we look at the progress towards paper-free processes, the triggers and decision-making processes, and the issues, benefits and ROI.

Key Findings

Paper in the Office

- **68% of respondents agree that business-at-the-speed-of-paper will be "unacceptable in just a few years' time".** 46% consider that the biggest single productivity improvement for most of their business processes is to remove the paper.
- **Only 35% of organizations have a maxim to drive paper out of the business, with just 19% having endorsement at board-level.** 56% have an environmental impact policy including reduced use of paper, but only 24% proactively promote it.
- **Overall paper consumption is decreasing in 44% of organizations compared to 35% three years ago.** However, it is still increasing in 21%. Paper flowing through processes is decreasing for 46% of organizations, increasing for 25%.
- **Over half of respondents print personal paper copies to take to a meeting, or to add a signature.** They also use printed copies for reading offline or out-of-the-office (50%), and particularly to review and mark-up (45%).
- **The average space taken up in offices to store paper is 13.5% (down from 15.3% in 2011).** Respondents suggest that with electronic-only filing, this would halve to 6.7% in 5 years' time.
- **Lack of management initiatives and the (perceived) need for physical signatures are given as the top reasons why there is still so much paper in business processes.** There is also felt to be a general lack of understanding of paper-free options.

Driving Paper Out

- **Improved searchability and sharability of business documents is the biggest driver for scanning and capture.** Faster response to customers, improved process productivity and reduced physical storage space are also big drivers.
- **On average, 35% of scanned documents are 100% born digital i.e., unchanged from printer to scanner.** 16% of scanned documents are photocopied before scanning, and 65% are not destroyed after scanning.

Capture at the Point of Entry

- **On average, 44% of invoices arrive as electronic (PDF, Fax, EDI).** 59% of these will still end up as a paper copy, mostly printed prior to manual processing (39%). 13% print a copy and then scan it back in. Only 8% pass it directly to the capture system.
- **27% "scan-at-the-door", including 18% using distributed capture across multi-channel inbound content and 9% using a digital mailroom.** 9% scan in advance of the process and 19% scan-to-archive after the process. 45% only do "ad hoc scanning".
- **38% of users showed an ROI from digital mailrooms within 12 months, and 60% within 18 months.** Respondents list faster turnaround to customers and more efficient data capture as the main benefits.

Outsourced Services

- **Our respondents generally expect to spend more with service providers on scanning pre-process, both with and without data capture.** Post-process imaging for archive is still growing, and there is still an appetite to spend more on back-scanning of paper records.

Paper-Free Processes

- **44% of organizations are only 10% towards their goal of paper-free processes.** 23% have yet to achieve any, including 22% of the very largest organizations. 17% are updating processes at a rate of five or more per year.
- **Legal and finance departments are considered to be the most resistant to paper-free working.** A mandate from above is the most likely trigger for implementation, but cost saving in specific areas is the next most likely.
- **60% of users have seen ROI on their paper-free projects within 12 months, and an impressive 77% within 18 months.** Faster response to customers and higher productivity are seen as the biggest benefits, along with improved remote and mobile availability.

Mobile Capture

- **Two thirds of respondents recognize the importance of mobile devices for content access and data capture.** 25% are keen to exploit mobile and 9% see it as a "required option for all processes".

Cloud

- **15% are already using cloud or SaaS for capture (including expense receipts), and 10% have immediate plans to do so.** 42% are still setting cloud strategies.

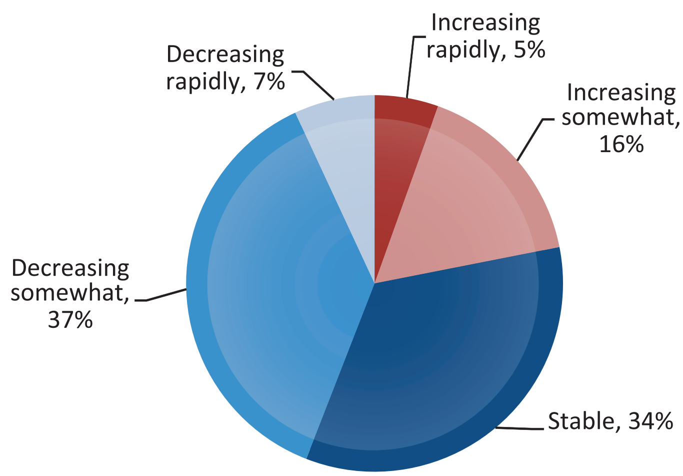
Spend

- **Spend intentions are strong in all software areas, particularly workflow and BPM, mobile, OCR/ICR and AP/AR.** Intended spend on scanners is largely neutral, except for mailroom scanners in Europe, where spend is set to grow.

Paper in the Office

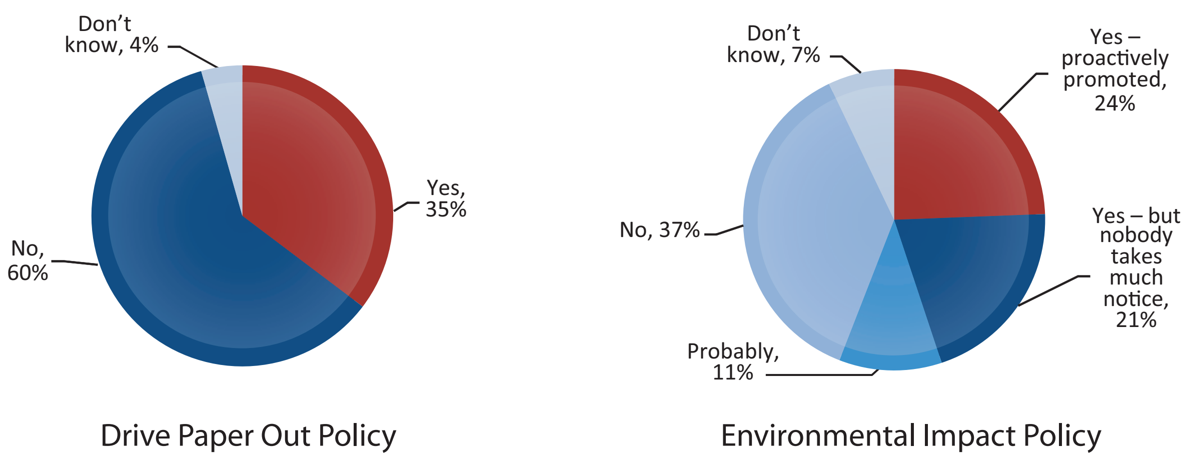
The good news from the battlefront is that 44% of the organizations we surveyed say that overall paper consumption is decreasing. Only 21% consider it to be increasing, so the net is 25% decreasing over increasing, albeit that a third see no movement in either direction. This compares with our survey three years ago where things were much more balanced – 35% decreasing and 32% increasing, so progress is being made. The largest organizations (5,000+ employees) are leading the way, with only 15% indicating an increase in paper compared to 43% seeing a decrease – a net of 28%. For the smallest (10-500 employees) the net is 21%.

Figure 1: Would you say that the consumption of paper and/or number of photocopies in your organization is? *(N=362)*



When it comes to policies that drive a general reduction of paper, things are a little more disheartening. Just over a third have a policy to drive paper out of the business and 24% have a proactive environmental policy that includes the reduced use of paper. Even where these are in place, the policy will most likely have been set below senior board level in all but 40% of cases, which explains the 21% with environmental policies that are largely ignored. Perhaps more commercial organizations should align themselves with the government sector where many follow a government mandate to reduce paper – nearly half in that sector for the US and UK.

Figure 2: Do you have a specific policy or maxim to "Drive paper out of the business"? Do you have an environmental impact policy that includes reduced use of paper? *(N=385)*



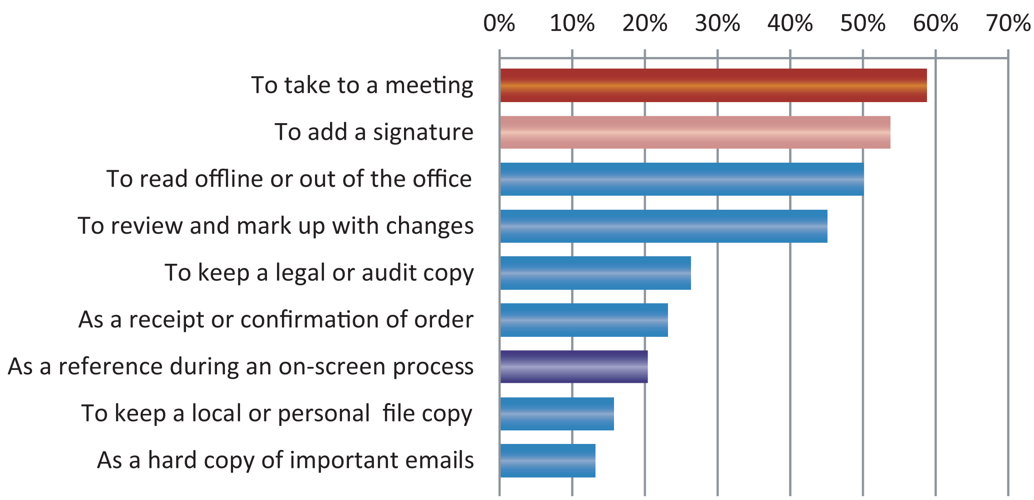
Consumption of paper in the office is decreasing for 44% of organizations surveyed, but still increasing for 21%. Two-thirds have no effective policies to drive out paper or reduce usage for environmental reasons.

Personal Paper Use

Out of interest, we also asked our respondents why they personally might resort to paper copies. 59% print papers to take to a meeting This is good to avoid the distraction of laptops and tablets being used for email during the meeting, but bad in terms of additional copies – especially if the meeting secretary also prints copies just in case. Then comes the need to add signatures, despite there being perfectly secure and legally acceptable digital and electronic signing systems available. Half print copies to read offline or out of the office, indicating that use of tablets while traveling is not as prevalent as we think – or that paper copies carried in briefcases or read on the train are considered to be more secure than password-protected mobile devices. Of course, formally reviewing documents and marking up changes has been a challenge on most consumer-orientated mobile devices.

One aspect that we found interesting was the 20% who print a copy of a document (especially a form or invoice) in order to have a reference while entering data into an on-screen process. As a side question we asked how many employees are equipped with two screens – and more than half have only one-in-four able to work dual-screen, and in more than half of organizations, a quarter of employees mostly work from laptops – not an ideal situation for complex, multi-application working.

Figure 3: For which of the following purposes do you personally resort to printing paper copies? *(N=357)*

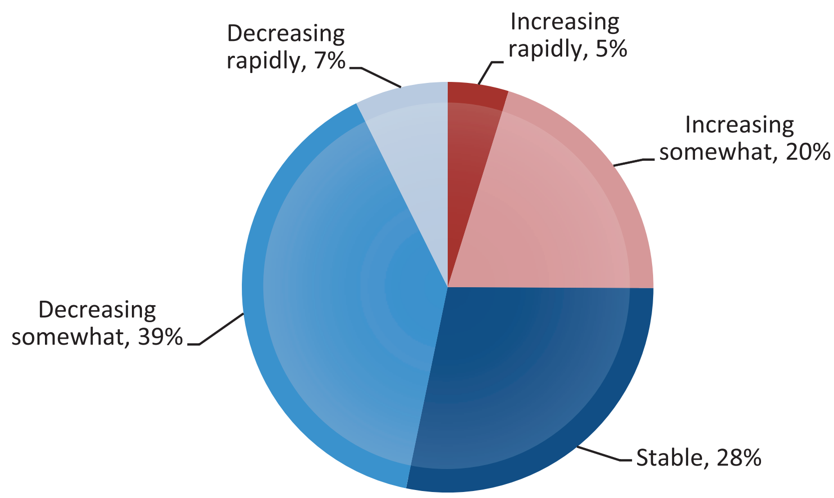


Paper and Processes

When it comes to the process battlefront, progress is being made, but it is slow. Overall, 46% report that the amount of paper flowing through their business processes is decreasing compared to 25% where it is increasing – a net of 21%. This compares to our survey last year where 41% reported a decrease, but with 19% then seeing an increase, the net was 22% - a very small change.

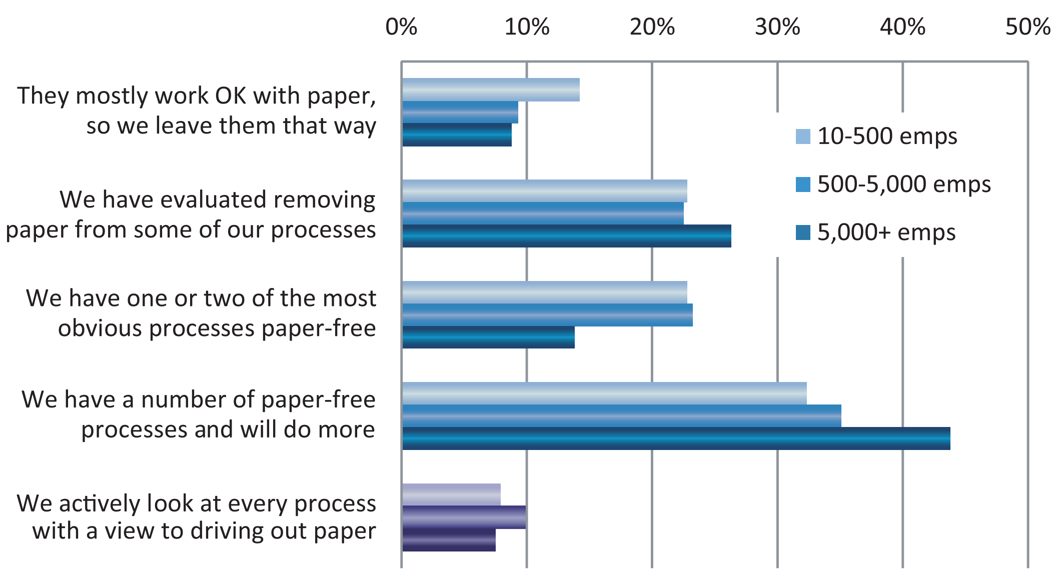
Larger organizations are making much greater progress, with a 55% reporting a decrease, and a net of 41%, compared to the smallest with 36% reporting a decrease and a net of just 10%. Although it could be argued that smaller organizations would struggle to justify extensive investment in capture systems, scanners and MFPs are ubiquitous, and as we will see, many transactional documents arrive electronically in the first place. On top of that, more than half of this group are 100-500 employee organizations, where significant numbers are employed in administration and process-based operations.

Figure 4: Would you say that the amount of paper flowing through your business processes is increasing or decreasing? *(N=364)*



However, there seems to be a huge variation in the largest organizations between the most progressive and the laggards, with 35% reporting (Figure 5) that paper-free thinking is at a somewhat immature stage – much the same number as amongst the smallest. Only 9% of all-sizes actively evaluate every process with a view to making them paper-free.

Figure 5: How would you describe your progress towards eliminating paper from your business processes? (N=358)



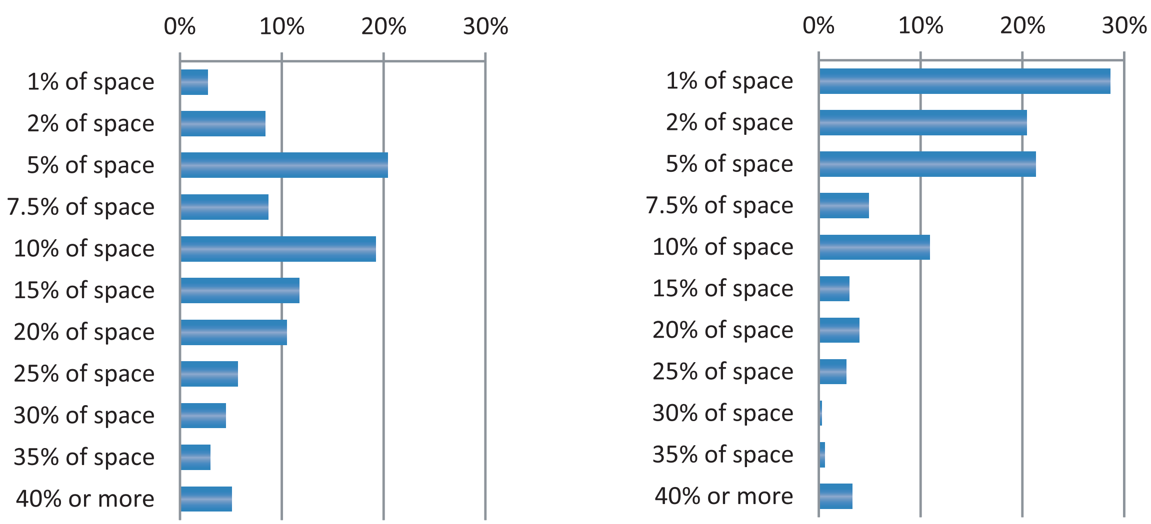
46% are seeing a reduction in paper flowing through their processes, but the rate of moving processes to be truly paper-free is slow. A third of even the largest organizations have yet to focus fully on the potential of paper-free working.

Drivers for Paper Reduction

Scanning or imaging documents for archive has been in place for over three decades. The business case based on savings in office space is easily made, although the widespread availability of box storage, and smooth collection and retrieval logistics has dented that case somewhat. Having said that, many records and files need to be held locally for immediate reference, and hot-desking, teleworking, and business flexibility have added to the premium on office floor-space.

The amount of current office space taken up by paper file cabinets varies quite widely, but the average in our survey is 13.5%. This is down from the 15.3% we measured three years ago, confirming the previous results of reduced paper in the business. When asked how they felt that might be reduced over five year's if an electronic-only filing regime were introduced, our respondents forecast a reduction to on average 6.7% - almost exactly half. This would represent an annual saving in office floor-space costs of 7%.

Figure 6: How much of your office space would you say is currently used for storing paper documents? What do you think that figure would be in 5 years' time if you could change the culture to one of electronic-only filing? *(N=329)*



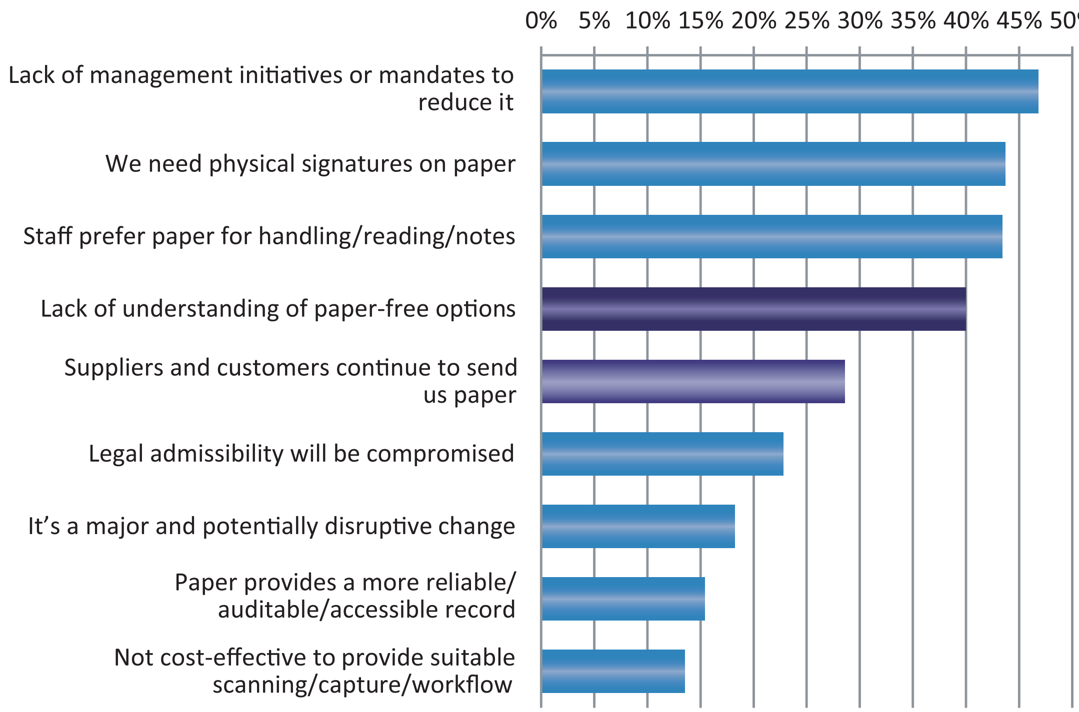
Why So Much Paper?

Business change doesn't just happen. There needs to be a will or a mandate for change, and this shows up as the top reason for the lack of progress on paper-free processes (Figure 7). There is also the natural human nature of resistance to change. We see this as the number three reason regarding how people prefer to handle, read and annotate documents, but it also crops up further down: process re-engineering frequently constitutes a major and potentially disruptive change. Number four indicates a lack of training and knowledge, and implies that there is much further work for AIIM and the information management industry to do in raising awareness and highlighting the options for paper-free processes.

Which takes us back to the number two reason, the need, or perceived need, for physical or "wet signatures" on paper. There are many different electronic signing solutions available ranging from stylus input, automated verification, digitally encrypted signatures, and web signatures, all of which have a place in achieving paper-free working. Stopping an otherwise all-electronic process simply to collect a physical signature on a piece of paper, which is often immediately re-scanned, is obviously somewhat sub-optimal – and frequently presents a greater confidentiality risk than the electronic original itself.

> 50% of respondents agree that signatures are the biggest single impediment to the wider use of paper-free processes.

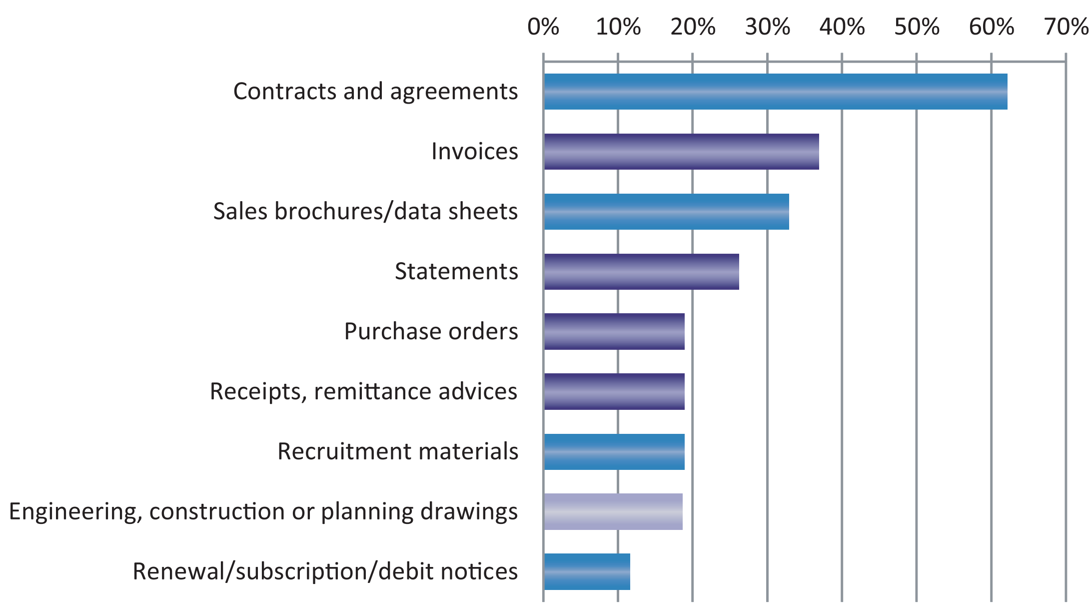
Figure 7: Why do you think there is still paper in so many of your business processes? (Max THREE) *(N=325)*



Reason number five for continued use of paper is that suppliers and customers continue to send their invoices, orders and correspondence on paper. This can, of course, be a somewhat circular argument, as confirmed when we asked the same respondents what documents they send out on paper. 62% send contracts and agreements, perhaps reflecting the signature issue, but even for basic transactional documents, 37% send paper invoices, 26% statements, and 19% are still sending paper receipts and remittance advices.

Intriguingly, 19% of those in our survey still send out engineering, construction or planning drawings even though only 3% of the demographic are in the AEC sector. We can assume that many other organizations use drawings for facilities management, plant maintenance, planning approvals, etc., but despite thirty years of CAD dominance, the "blueprint" still survives.

Figure 8: Which of the following do you still mostly send out as paper? *(N=301)*

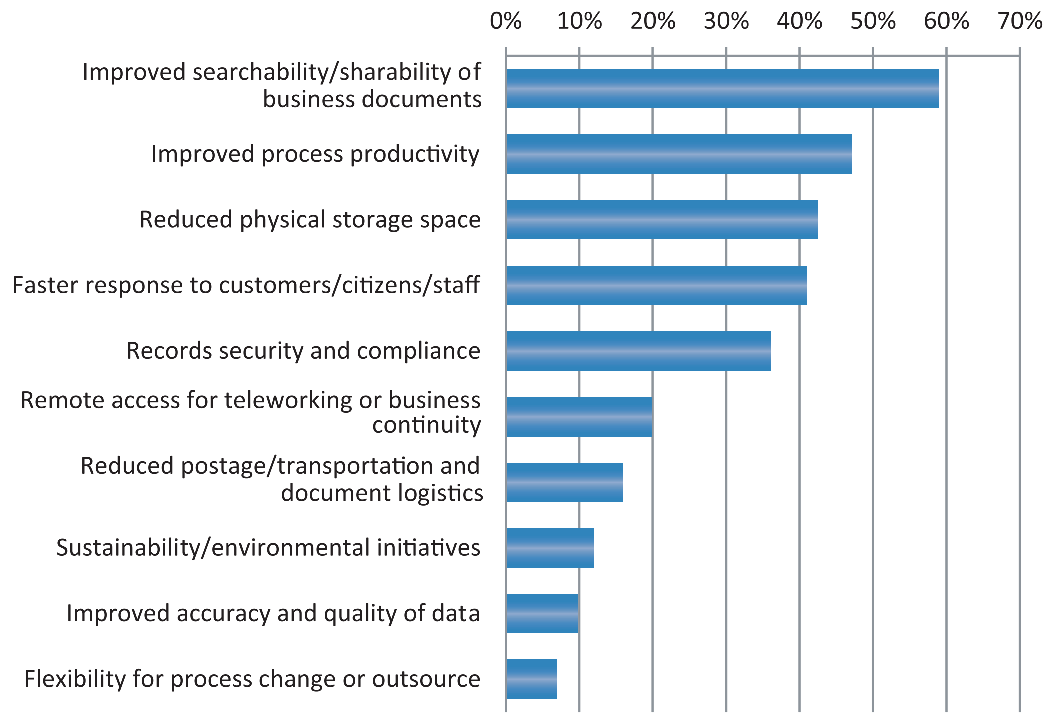


Lack of management initiatives is a significant reason for ongoing consumption of paper in the office, but many organizations are still sending out invoices, statements and other transactional documents on paper.

Scanning and Capture

We have asked the next question over many years and many AIIM surveys, and each time the biggest driver for scanning and capture is improved searchability and sharability of business documents. Number two is improved process productivity, and only then comes reduced physical storage space. There is one change in the number four position. Compared to three years ago, faster response to customers, citizens and staff has overtaken records security and compliance, indicating the speed of business expectation that we mentioned earlier. The order here is the same across all sizes of organization, except that customer response rises a step higher for smaller organizations.

Figure 9: What would you say are the three biggest drivers for scanning and data capture in your organization? (Max THREE) *(N=327)*



Scanning Characteristics

We asked a number of questions in the survey in order to paint a picture of current practice in scanning – though not necessarily best practice. These may be helpful to others needing to make decisions or spot discontinuities in what they do. Presenting averages can obscure a very wide range of answers, but the medians (half-and-half) align quite closely in most of these cases.

- How many of the documents that you scan would you say are “born digital“ (unchanged from printer to scanner)?
  - For 34% of org, half or more of scanned documents are 100% born digital.
  - ***On average, 35.6% of scanned documents are 100% born digital.***
- How many of the documents that you scan are photocopied before scanning?
  - For 10% of orgs, half or more of scanned docs are photocopied before scanning.
  - ***On average, 16.1% of scanned documents are photocopied pre-scanning.***

- How many of the documents that you scan are destroyed after scanning?
  - For 61% of orgs, half or more of scanned docs are not destroyed after scanning.
  - ***On average, 65.1% of documents are not destroyed after scanning.***
- How many of the documents that you scan are archived off-site after scanning?
  - For 23% of orgs, half or more of scanned docs are archived off-site after scanning.
  - ***On average, 26.0% of scanned documents are archived off-site.***
- How many of the documents that you scan would you say are routinely reprinted from the scanned copy?
  - For 14% of org, half or more of scanned docs are routinely reprinted.
  - ***On average, 19.1% of scanned documents are routinely reprinted.***
- How many of the documents that you scan are saved as PDF (not TIFF or JPEG)?
  - For 60% of orgs, half or more of scanned documents are saved as PDF.
  - ***On average: 59.8% of scanned documents are saved as PDF.***
- How many of the documents that you scan are saved as PDF-A?
  - For 17% of orgs, half or more of scanned documents are saved as PDF-A.
  - ***On average, 22.9% of scanned documents are saved as PDF-A.***

There are a number of things to highlight here. If they have not been signed, or form-filled by hand, capturing documents in their original "born-digital" form will obviate the need for both the print process and the scanning process. Photocopying documents prior to scanning is generally unnecessary, but is a common practice, especially where branch offices are not connected to a distributed capture network. Precautionary copying may also be used where document scanning is outsourced, but again, unless continuous access is needed, a close audit trail of the process should be sufficient for assurance.

The fact that two-thirds of scanned documents are not destroyed after scanning suggests a lack of faith in the longevity of electronic archives, or a misunderstanding of the legal position, and simply serves to fill warehouses with unnecessary and potentially non-compliant duplicates.

The adoption of PDF as the preferred and more flexible and searchable image format has progressed, but the take up of PDF/A, which is widely accepted as the safe, long-term standard is surprisingly slow.

Even within capture operations, additional paper is still being generated for back-up copies, reprints, or archived originals. Adoption of the PDF-A archive standard is still limited.

Inbound Documents

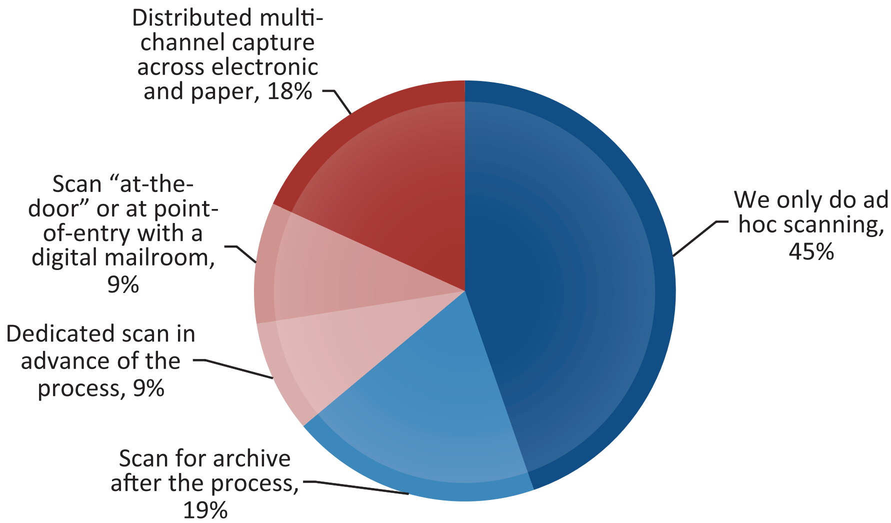
Capture Adoption

Given the slow progress of paper-free processes, we must accept that ad hoc scanning is the highest maturity level for 45% of our respondents – 36% of the largest, rising to 52% for the smallest.

Of the rest, half scan at point of entry either with a digital mailroom (9%) or across distributed multi-channels. Distributed capture may also include a central digital mailroom. We have always noticed a significant difference for stated adoption of "digital mailrooms" between North America (8%) and Europe (13%), but this could be a terminology issue.

For those not scanning-on-entry, the majority (19%) scan to archive after the process, rather than in advance of the process. This has always seemed a missed opportunity: process at the speed of paper, archive at the speed of light.

Figure 10: Which of the following best describes how you mostly deal with inbound documents and forms in your business unit (in-house or outsourced)? (N=291)



Invoices

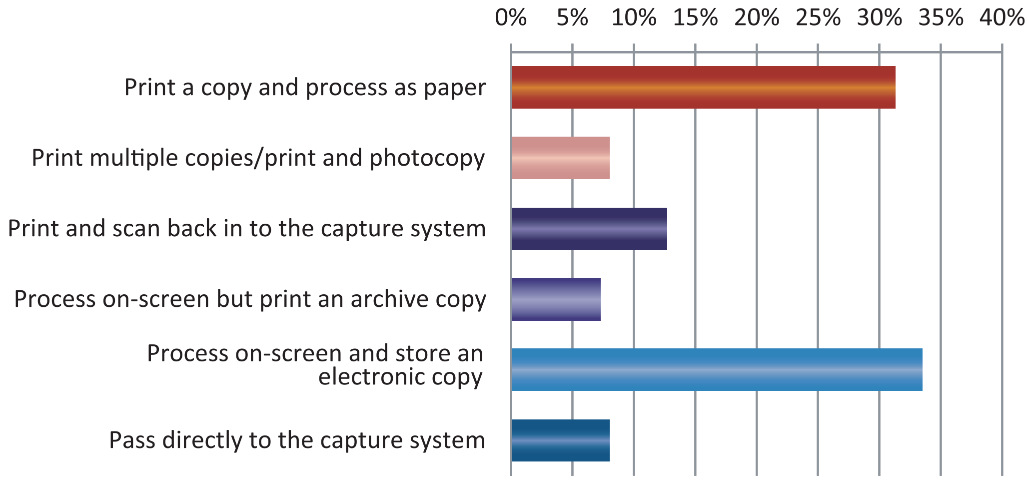
In the previous section we referred to born-digital documents, and how to avoid the double jeopardy of going out through printers and in through scanners. But, of course, because the documents may be created in one organization and "consumed" in another, standards are required to achieve alignment. The EDI transaction standards were originally developed for this, but outside the world of major supply chains, they are rarely used. As we saw earlier, many organizations still send out paper invoices, and the most popular application of pre-process capture[1] is ingesting invoices into the accounts payable (AP) process.

However, as we all know, the default standard for exchanging electronic invoices is PDF, and although this is predominantly a print-image representation, as a source for OCR data capture it is likely to be a much cleaner representation than a scan of the paper invoice. Even if it is merely used as an on-screen image for reference, it will have avoided the trip through the printer and the scanner.

- What percentage of your incoming invoices would you say arrive electronically (PDF attachments, Faxes, EDI)?
  - For 49% of orgs, half or more of invoices arrive electronically.
  - 30% receive three-quarters or more this way.
  - ***On average, 44.2% of invoices arrive as electronic.***

Alas, as we can see in Figure 11, once received, it is a struggle for the PDF invoice to stay electronic. In 59% of business units, the invoice will still be printed out at some point in the process. (At least this is an improvement on the 2011 situation where 77% resulted in a printed copy). For the 31% who print a copy and process as paper, the lack of a dual screen may be an issue as we saw earlier. However, 7% of those who process on-screen still print a copy for archive, and astonishingly, 13% print a copy upfront and scan it back in to the system. 34% process from the on-screen image file and store an electronic copy, but only 8% pass electronic invoices and other forms directly to the AP capture system.

Figure 11: How do you generally deal with invoices, purchase orders and forms that arrive as PDF attachments to emails? _(N=291)_

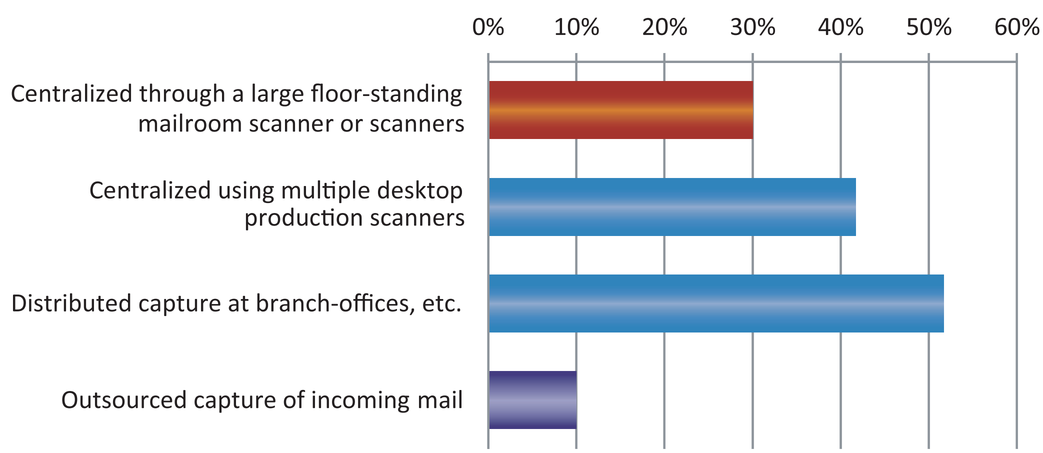


Scan-on-Entry

The concept of scanning all inbound mail at point-of-entry and routing it around the business electronically is very attractive, especially if it can significantly reduce or even eliminate internal mail distribution. Obviously, this will depend on the proportion of inbound mail that is scanned. We asked those who consider they have a digital mailroom scenario what proportion they scan (not including brochures, junk mail, etc.). 45% are scanning half or more of incoming mail, and 34% are scanning three-quarters. A significant 23% are scanning 90% or even 100%. Overall, for those operating this way, an average of 42.2% of inbound documents are being scanned "at-the-door".

The concept of a digital mailroom does not rely on the use of large central mailroom scanners. Mail capture can be distributed across branch offices, and can be readily outsourced.

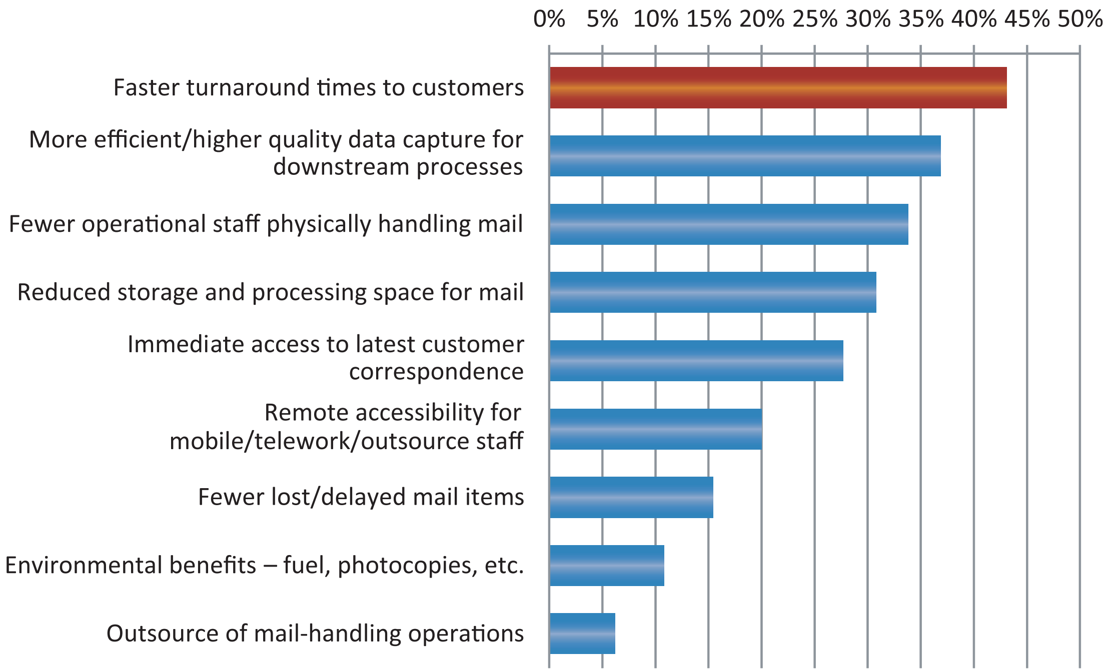
Figure 12: Which of the following "digital mailroom" scenarios do you use?
(N=60, excl. "none", multiple answers)



Digital Mailroom Benefits and ROI

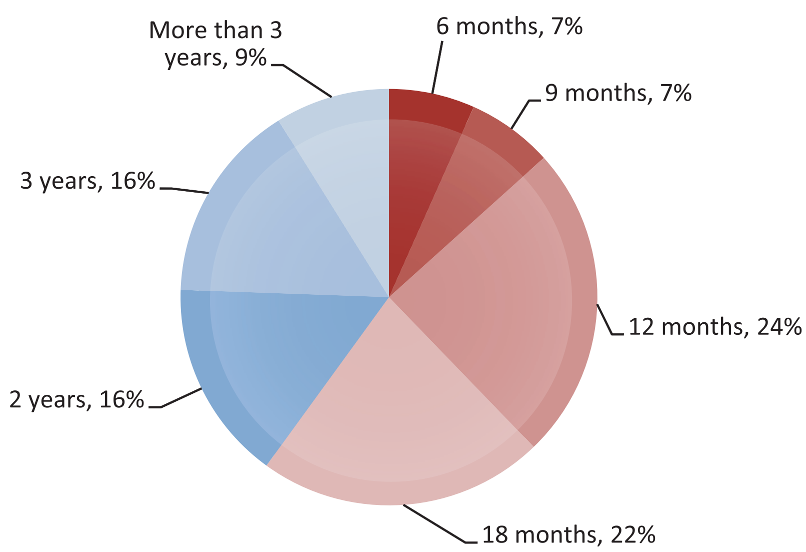
Relying on physical mail handling, particularly between branch offices and head office, can add many days into the response cycle to customers. This is a particular issue in many applications where customer service representatives need immediate access to customer correspondence in order to respond to follow-up telephone calls. Cleaner data, fewer handling staff, and reduced storage and processing space are additional advantages.

Figure 13: Which aspects of digital mailrooms are proving the most beneficial? (Max TWO) *(N=65, digital mailroom users)*



Although the investment in scanners and capture servers for scan-on-entry systems can be considerable, most of our users saw a strong ROI, with 38% reporting payback in 12 months or less, and 60% within 18 months.

Figure 14: What would you say has been, or is expected to be, the payback period of your investment in digital mailroom? *(N=45 Dig. Mailroom users, excl. 32 Don't Know)*



The digital mailroom concept is being adopted as part of a distributed multi-channel input capability, with benefits in speed of response to customers and more consistent downstream data.

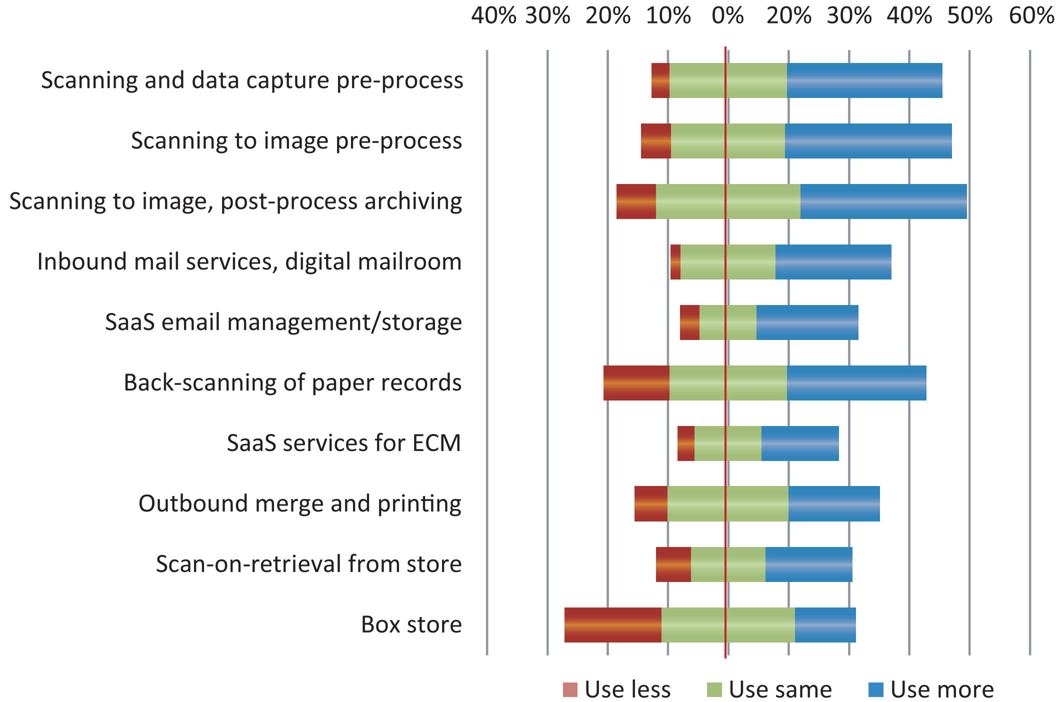
Outsourcing

During the post-recession years, we noticed some retrenchment on the use of outsourced services, but as volumes grow once more, it looks like users will spend more in all areas. Figure 15 indicates that scanning and data capture pre-process will see the strongest growth, followed by more straightforward imaging both pre-and post-process, the latter being the most popular outsourced process. There have been predictions that back-scanning of historical paper records is in decline as most of the major projects have been completed, but we are seeing no sign of that here, with a net growth in spend being predicted for next year.

Comparing European response to North America, there would seem to be less growth potential in the more traditional post-archive scanning and back-file conversion and more in inbound mail services and email management. Paper box stores are the only area where net spending is likely to reduce in both geographies.

SaaS services for email management look to be slightly more popular than SaaS for ECM, but both are looking at modest growth next year.

Figure 15: What use do you make of outsourced document services and what are your plans?
(N=263. Ordered by net more. Line length indicates Don't Use)

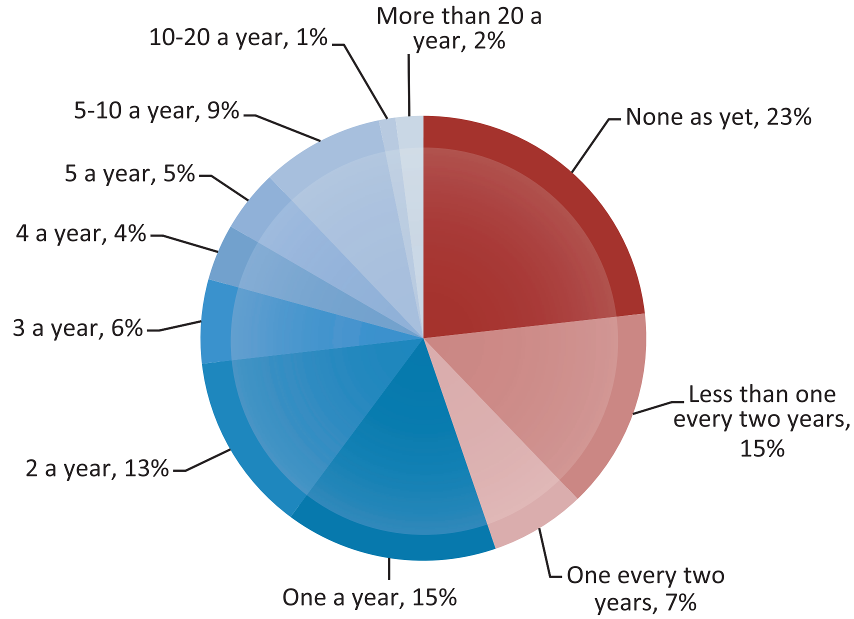


Paper-Free Processes

We talked earlier about the very variable levels of maturity in adopting paper-free processes. When we asked our respondents how far their organization is towards the goal of driving out paper from all of their candidate processes, 44% feel they are only 10% towards that goal, including 14% who haven't even started the thought process yet – and this applies even to the largest organizations In Figure 16 we asked at what rate they are converting processes to paper-free. Here the number yet to have any live paper-free processes goes up to 23%, so comparing that with those who have yet to take any steps indicates that 9% are in planning mode for their first paper-free process transformation.

By contrast, 17% of organizations are updating processes at the rate of 5 or more per year, with some even undertaking 10 or even 20 per year – and these are not just the large organizations or government sector ones. Here we see the benefit of investing in enterprise-scale capture installations that can be utilized across multiple projects

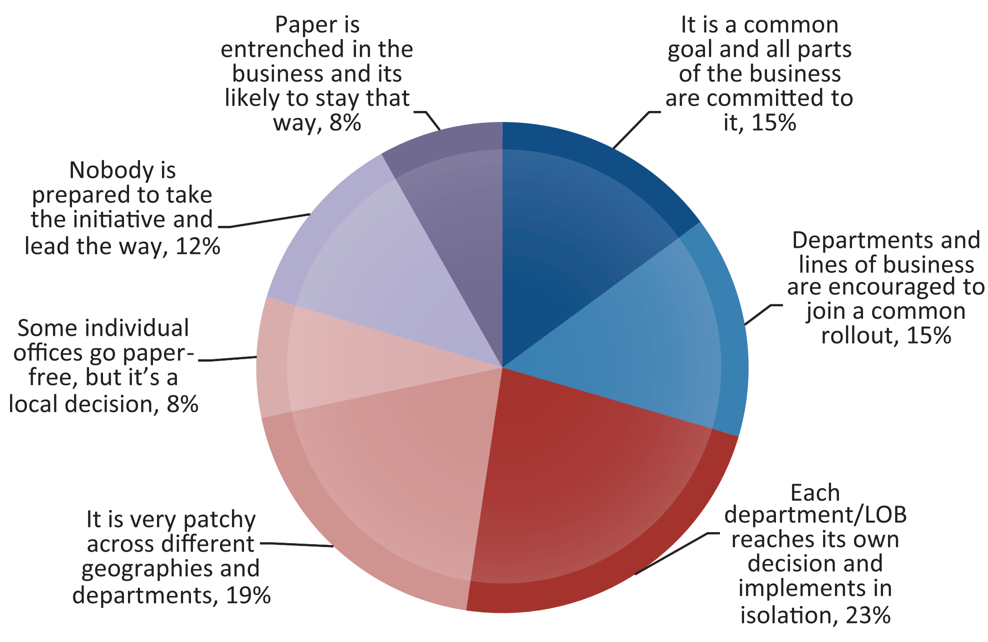
Figure 16: At what rate (or planned rate) are you converting processes to paper-free? *(N=246)*



Decision Process

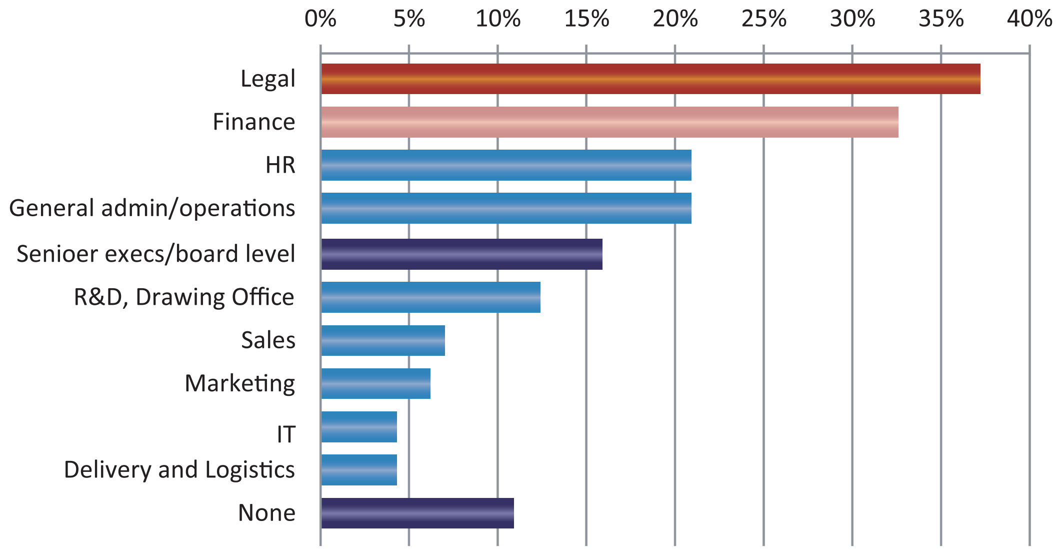
Process change decisions might reside within one line-of-business, or cross over between different departments. If the whole business is signed up to drive towards paper-free working, it becomes much simpler to organize change within any given process; to amortize investment across multiple applications; and to maximize the levels of experience and expertise. Unfortunately, around half of our respondents report that each department or line-of-business is likely to make its own decision and implement in isolation.

Figure 17: How would you describe the decision-making process as regards moving processes to be paper-free? *(N=262)*



As we have hinted before, some departments are likely to be more resistant than others, largely because of their perception of the potential legal and audit issues. Given the relative popularity of automated AP, it is interesting that the Finance department in general is likely to have strong reservations. Senior executives seem surprisingly open on the whole, and 11% of our respondents live in very forward thinking organizations where everyone is keen to be rid of paper.

Figure 18: Which departments in your organization would you say are the most resistant to the introduction of paper-free working? *(N=258)*



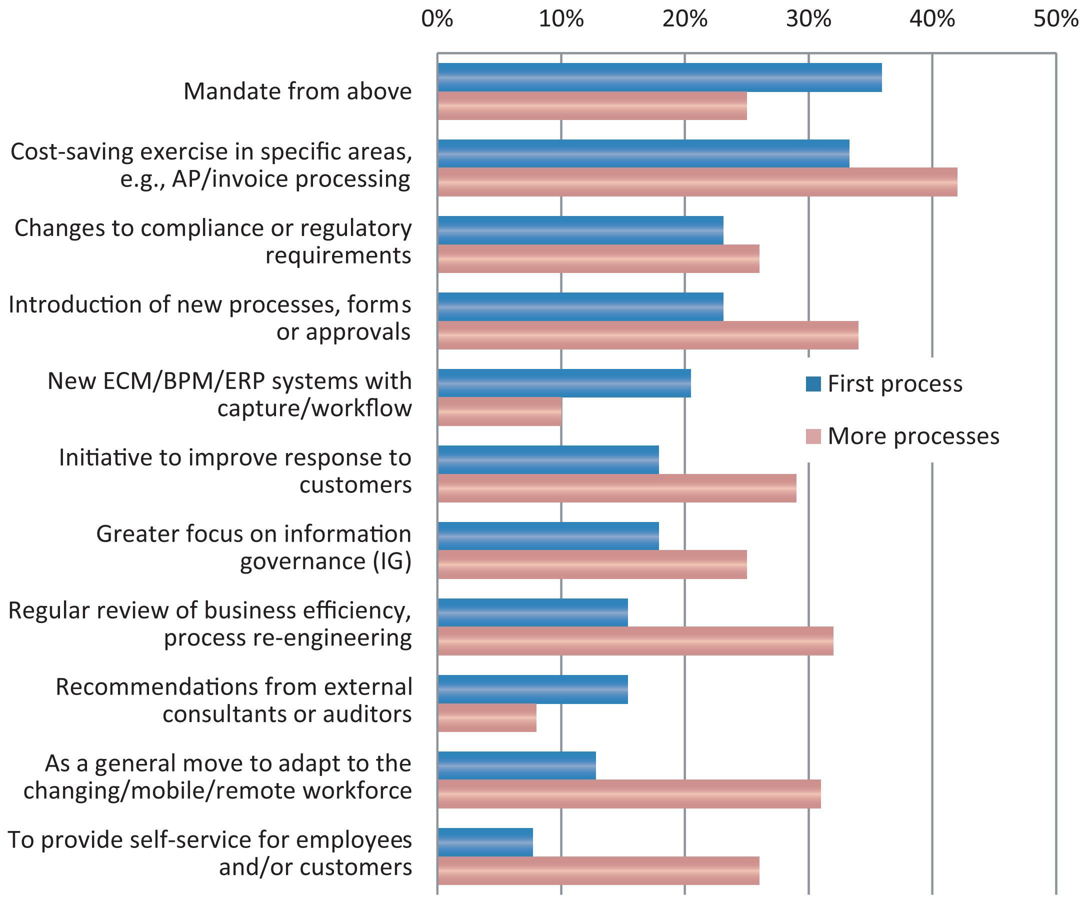
The rate of conversion to paper-free is hugely variable from 1 or less processes per year to five or ten. Even so, there is a huge way to go with nearly half feeling they are only 10% there yet. Fragmented decision making across departments is hampering progress.

Triggers for Paper-Free Working

For those organizations with no paper-free processes yet, our respondents feel that a mandate from above is the most likely trigger to action, or it might be a cost-saving exercise in a specific area – which confirms the singular approach described in the previous section. Changes to compliance and new processes also figure highly on this list.

For those who are already on the path to paper-free processes, cost-saving reviews on a process-by-process basis comes across strongly as a driver to do more. "As a general move to adapt to the changing/ mobile workforce" moves up to number four, perhaps recognizing that mobile and remote access are often not included in the primary business case, but in practice show as a strong benefit when weather, environmental or individual staff incidents arise. Self-service for customers and employees is also a stronger driver for more mature adopters, reflecting the greater take up of paper-free in the financial sector.

Figure 19: What would be the trigger(s) to set you off on your first paper-free process implementation/converting more processes? (Max TWO) *(N=39 non paper-free)*



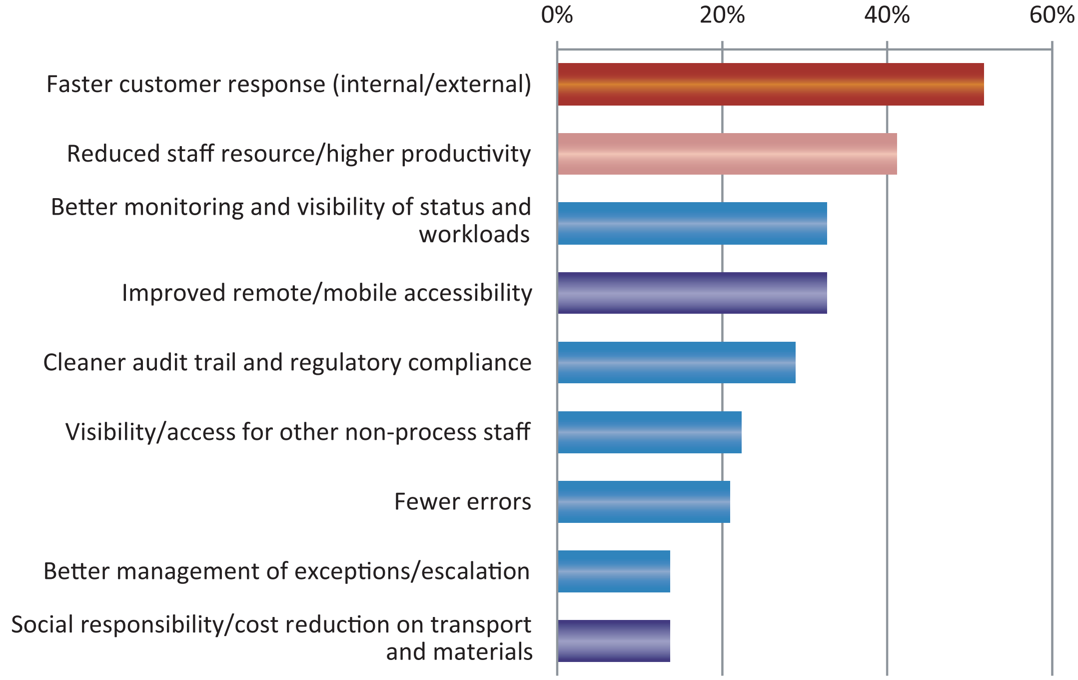
Benefits and Issues

Faster customer response tops the list of benefits, whether those customers are other internal departments and staff, or external customers and suppliers. In last year's survey1 we found that response times can be improved on average by a factor of 4.6, reducing weeks to days or days to hours. In this era of customer experience management, where high expectations have been set, improvements on this scale are dramatic. Next comes productivity improvements, and again, in last year's report respondents reported a productivity improvement of 35%.

Better monitoring and visibility of status and workloads is a key benefit for process managers and supervisors, helping to smooth workloads, and spot backlogs. At number four we have "improved remote and mobile access". These rankings have changed somewhat since last years' survey, with audit trails and compliance dropping down from number one to number five, and remote access rising above it.

Sadly, although not unsurprisingly, social responsibility and reduced consumption of paper, materials and transport is rated lowest on the benefit scale, reinforcing the fact that the productivity and service benefits of paper-free processes are a stronger imperative than the paperless office per se.

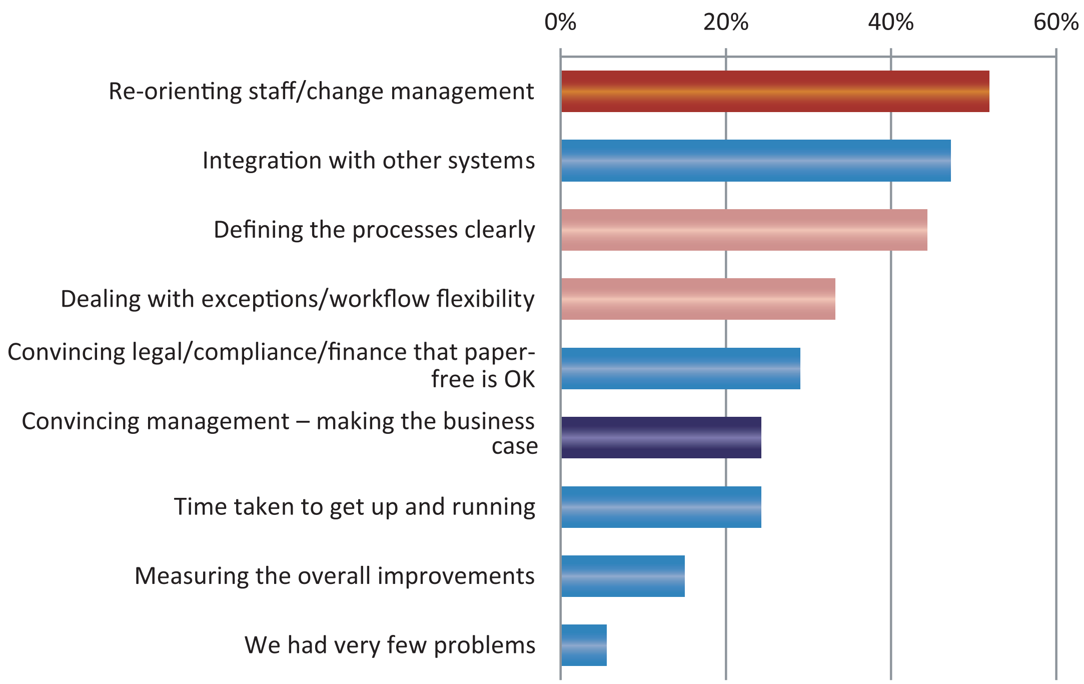
Figure 20: What have been the biggest benefits from your paper-free processes? (Max THREE)
(N=211, with some paper-free processes)



Issues

Managing change amongst staff is inevitably the biggest issue reported (Figure 21), and all the usual rules of change management need to be brought into play. The next issue is a purely technical one – how to integrate with other systems, although there can be human elements if the "owners" of enterprise systems are reluctant to take on board integration re-work. The next two issues are a mixture of human and technical. Clearly defining the existing process workflows, and in particular, how exceptions are handled is a task that needs to involve all managers, supervisors and process operators. It is encouraging that convincing management of the business case has dropped from 32% to 24% since last year.

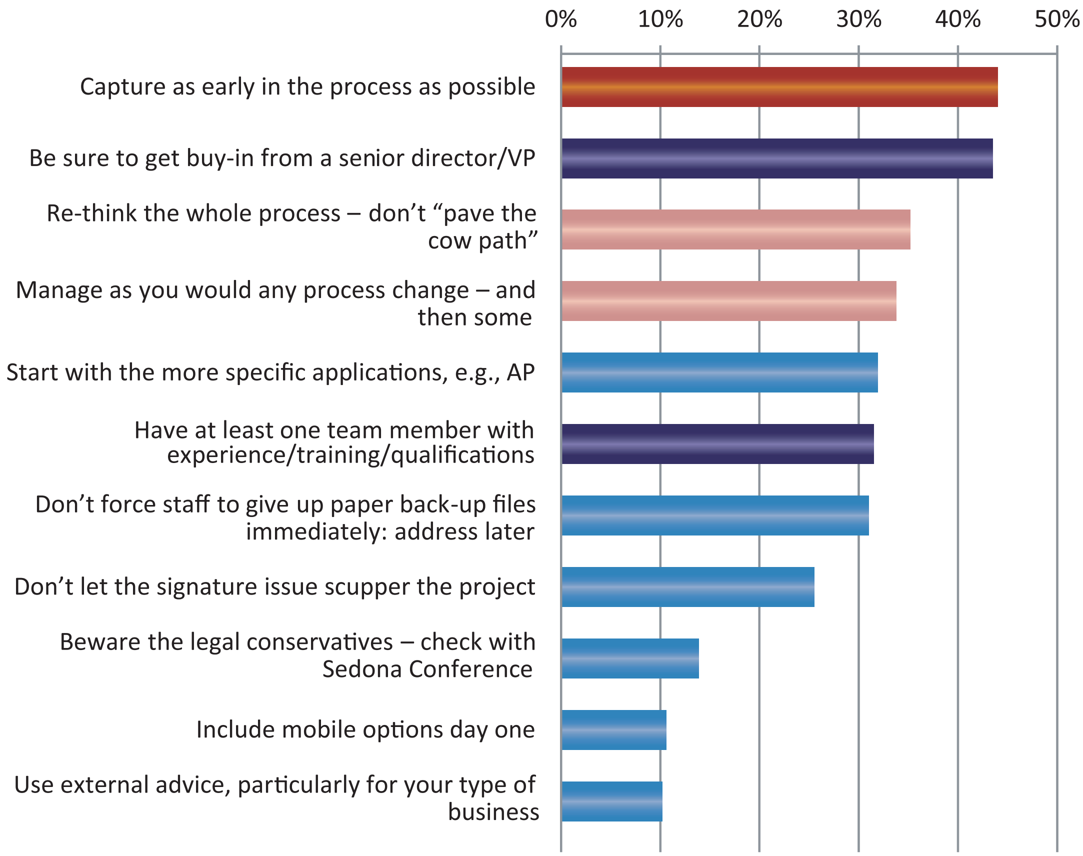
Figure 21: What were the main difficulties you encountered in these paper-free process projects? (Max THREE) *(N=213, with some paper-free processes)*



Lessons Learned

We mentioned earlier that imaging for archive post-process seems to be a missed opportunity, and this is confirmed by the experience of our users, who very much endorse the move to capture as early in the process as possible. They are also very much in process re-engineering mode, re-thinking the process and managing it as a major change. In that vein, it's important that senior management are involved, and endorse the project, and it's also important to have at least one member of the team with experience, qualifications or (AIIM) training – more so, in fact, than using external advice.

Figure 22: What are the key lessons have you learnt so far from your paper-free processes?
(N=216, with some paper-free processes)

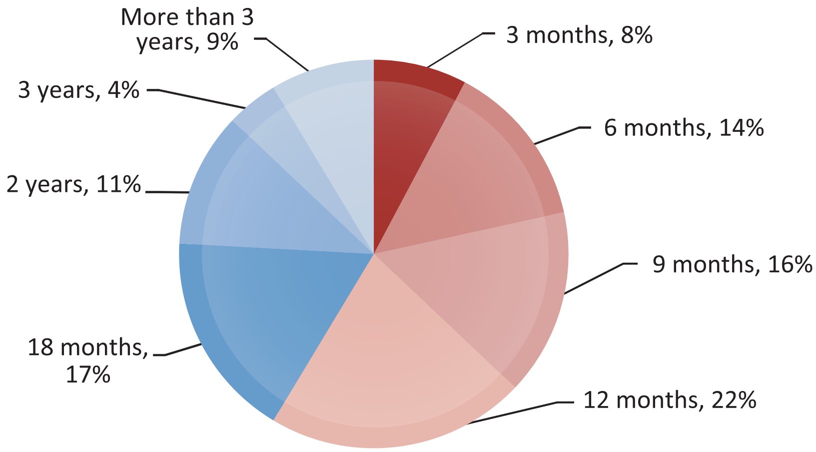


Change management, integration, and process definition are given as the biggest issues. Capturing as early in the process as possible is given as the biggest lesson learned.

ROI

60% of users reported a payback period of 12 months or less, with 77% seeing a return after 18 months. We have been measuring the ROI for scanning investments for many years, but this result is the highest we have ever recorded. In last year's survey, it was 66% in 18 months, and three years ago it was 57%. This must surely reflect a number of things: the cost of capture systems is decreasing steadily, the levels of experience and the implementation skills are increasing, and the capabilities and breadth of processes is expanding.

Figure 23: Overall, what would you say has generally been the payback period for these paper-free process projects? *(N=217, with some paper-free processes)*



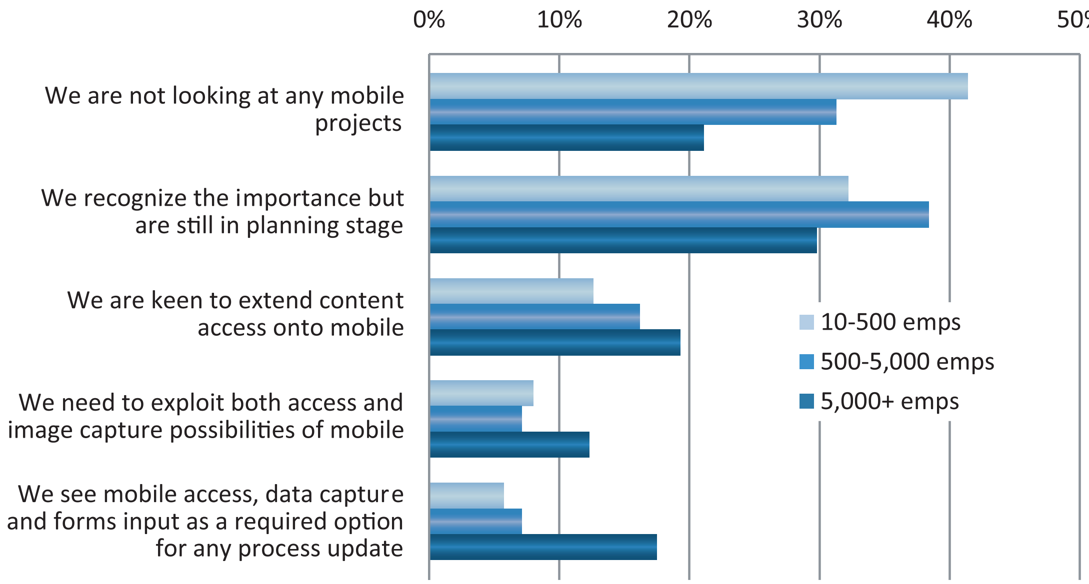
77% are seeing ROI in 18 months or less, 60% within 12 months. The biggest benefits are improved speed of response to customers and higher process productivity.

Mobile Capture and Cloud

As the camera capabilities of mobile devices have improved, the concept of using them as a portable scanning device has taken off. In addition, tablets provide a new way to access electronic forms, creating what we might call a digital clipboard. Indeed, some of the applications are quickly becoming ubiquitous – paying in checks (cheques), scanning receipts for expense claims, submitting damage photos for insurance claims, and even taking orders in restaurants. Capturing signatures with stylus-tablets has been in use by delivery firms for many years, but there is now an opportunity to extend that to many other areas, or simply to photograph the form, with its signature.

Beyond these applications, the picture is more varied, with many organizations being resolutely against company content being accessed on mobile, and by implication, being captured by mobile. In other organizations it is simply a case that extending processes to mobile is not front-of-mind, and this seems to be much more so in small to mid-sized organizations than in the largest ones, where 18% now see mobile access, data capture and forms input as a required option for any process update.

Figure 24: How are you looking at mobile devices for content access and data capture?
(N=69, Excl. 114 Don't Know or Too Early to Say)

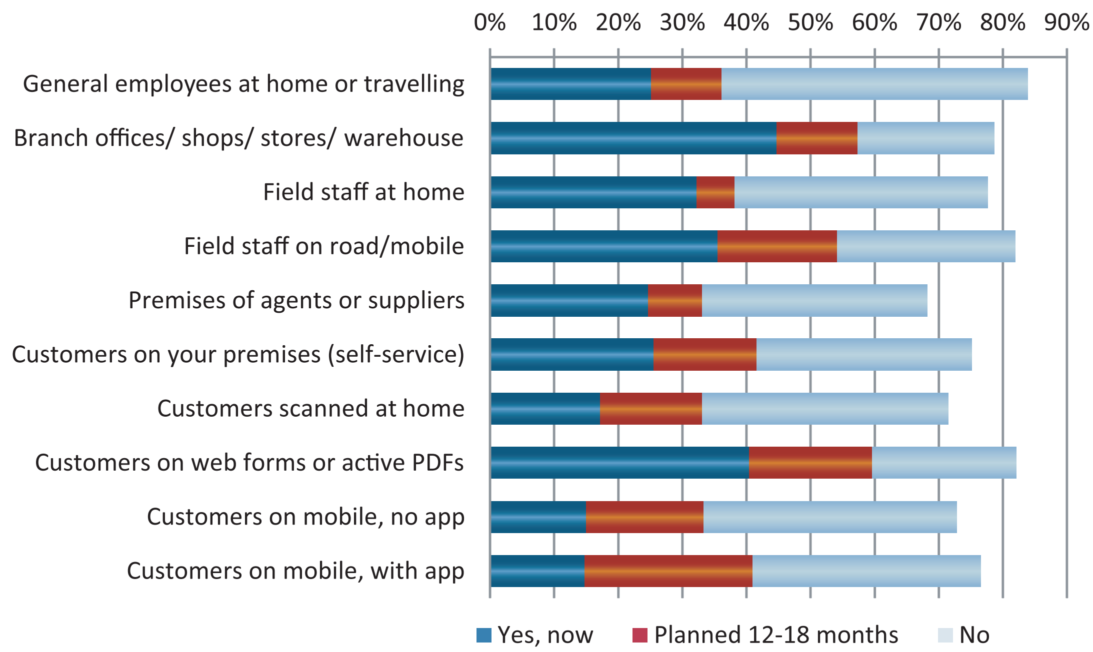


The wider applicability of tablets as corporate devices does open up more possibilities, and whereas only 6% of respondents report that half or more of their employees are currently using tablets or digital clipboards for filling in forms, 53% feel this will be the case in five years' time.

Places for Mobile Capture

Distributed and mobile capture opens up many possibilities - for remote, traveling or field-based employees, and for self-service by customers or citizens. Of note in the responses are that plans are in place for more remote capture on mobile for field staff; expansion of self-service for customers both on-premise and at home; and a big planned increase for customers on mobile, particularly using dedicated apps.

Figure 25: Are forms and documents currently captured in any of the following places for use in your key business processes? *(N=162, excl. N/A)*

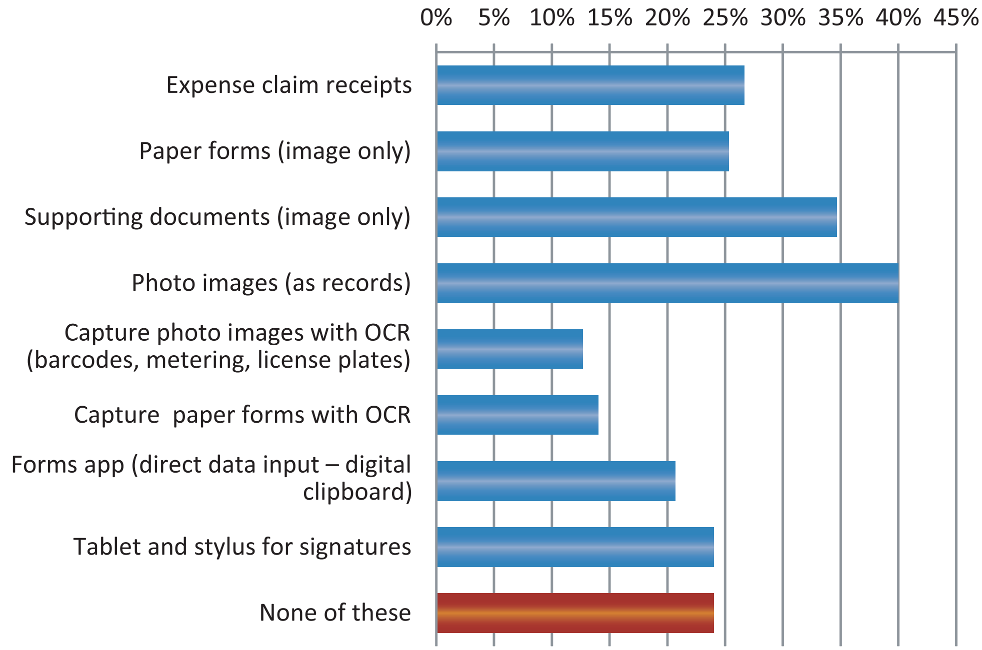


Content for Mobile Capture

When it comes to the types of content being captured, particularly by employees, receipts, forms and their supporting documents are the prime targets (25-35%), but still less so than photo images for use as records of inspections, incidents, surveys, etc. (40%). Character recognition for forms, and also for meter-reading, license plates, etc., is another interesting application area.

We are likely to see considerable growth in forms on tablet and signature verification, currently running at around 20%.

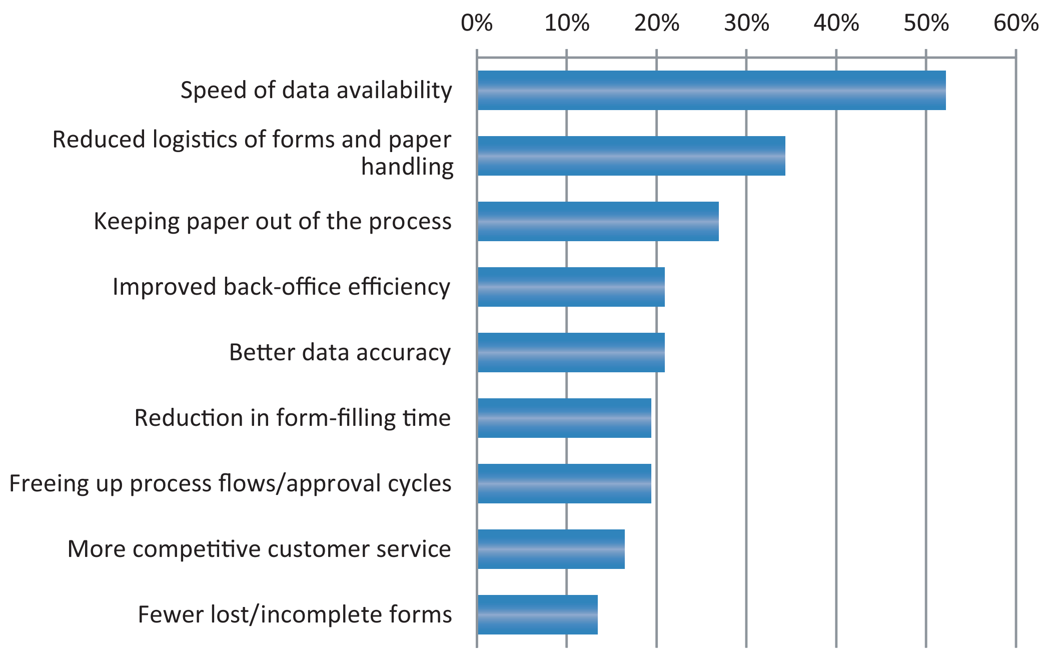
Figure 26: Do employees in your business unit use portable devices (portable scanners, smartphones, tablets) for any of the following? *(N=150, excl. 19 Don't Know)*



Benefits and Issues

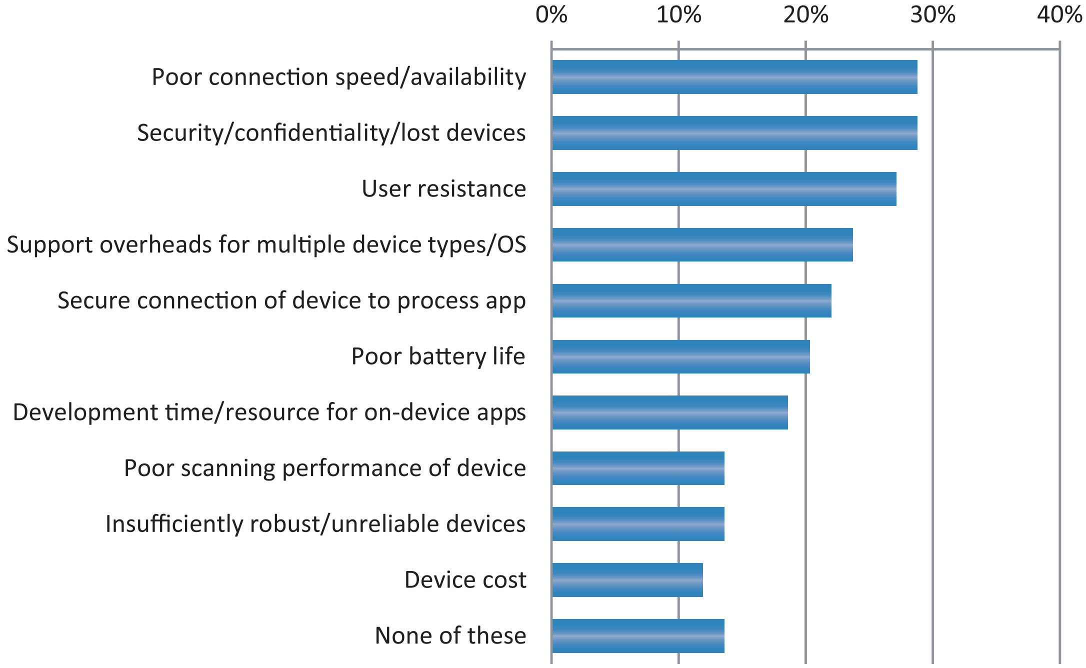
The overriding benefit of mobile capture is speed of data availability: the process can start sooner and customer response will be faster. With immediate transmission of completed forms, collection logistics are much reduced. Beyond this, there are further benefits in Figure 27 that all received some confirmation, despite the limit of a maximum two selections.

Figure 27: What have been the two biggest benefits of your mobile/portable capture projects? (Max TWO) *(N=67 with mobile)*



Despite the spread of 3G and 4G networks, poor connection speed is rated as a big issue with mobile – ranking alongside security and lost devices. Good design of capture apps is therefore important to ensure offline capability and stable re-connect behavior. Security and support across multiple devices is an issue, best resolved by using a mobile development platform. User resistance figures quite highly, which could still be a keyboard skills issue, or dislike of touch tablets versus laptop keyboards, or simply resistance to change.

Figure 28: What issues have you encountered with your mobile/portable capture projects?
(N=67 with mobile)



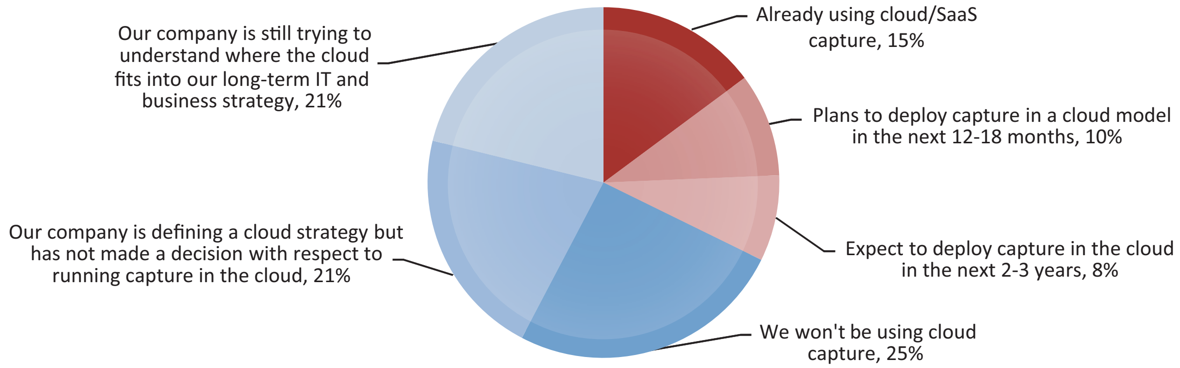
Poor network coverage is as big an issue for mobile capture apps as security, but speed of data availability and simpler logistics for forms collection are the key benefits.

Cloud

We have seen steady movement in both the use of cloud, and the general willingness to use cloud across the whole ECM spectrum in the past three years. Capture is an interesting application for cloud or particularly SaaS in that data requirements are high, but the recognition technology involved benefits from large, dedicated servers and sophisticated software. Equally, the popular expenses reporting applications we spoke of earlier are, in effect, SaaS applications.

Figure 29 probably overstates things somewhat as 24% are Don't Knows, meaning they probably don't have a strategy as yet. On this basis, the number of current users of Cloud or SaaS capture applications is more realistically 11%, but those with plans to deploy in a cloud solution within the next 18 months will still nearly double that figure to one-in-five, rising to one-in four within 3 years. Larger organizations are the leaders in current use, with mid-sized lagging considerably on both larger and smaller with just 6% currently using.

Figure 29: What is your strategy for cloud deployment of capture? *(N=189, excl. 59 Don't Know)*

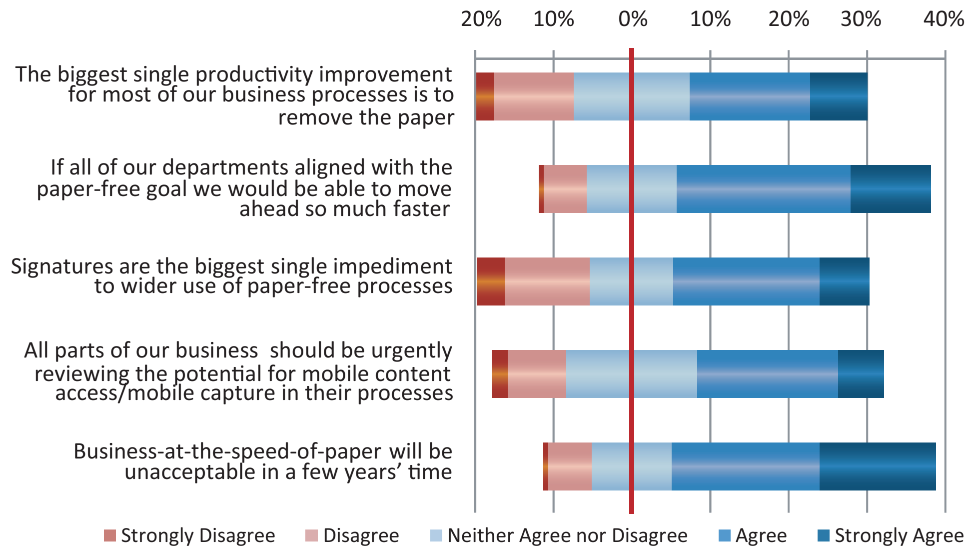


Opinions and Spend

In Figure 30 we have canvassed opinions across our respondents on a number of trends and issues. There is general support for the view that removing paper is the biggest single productivity improvement that can be applied to most business processes, but a much stronger view that these projects would move ahead much faster if all departments were aligned around a single goal. The signature issue is reinforced here, with half agreeing that it is the biggest single impediment to paper-free progress.

Only 19% disagree that all parts of the business should urgently review the potential for mobile content access and mobile capture, with 48% seeing this as important. The biggest agreement (68%) is that if businesses continue to run at-the-speed-of-paper they will become more and more uncompetitive, as the rising expectation amongst customers and employees is for a much more rapid response.

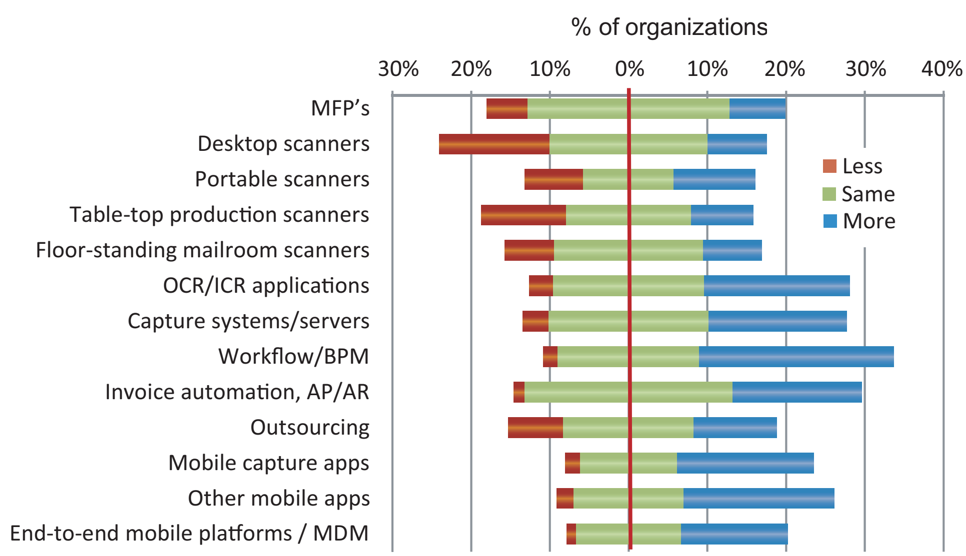
***Figure 30: How do you feel about the following statements?** (N=239)*



Spend

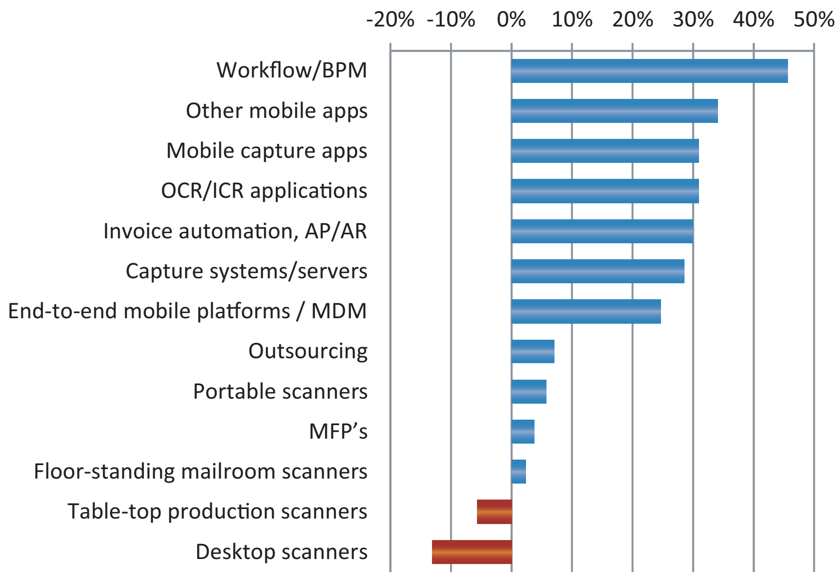
The market for capture software is healthy, with most of those surveyed expecting to spend more on workflow, and OCR/ICR applications and capture systems in general. There is also a strong expectation of spend on mobile apps and platforms. With the exception of large mailroom scanners (particularly in Europe), spending on scanners is likely to be flat or in slight decline – perhaps based on an expectation of falling prices. Outsourcing, as we saw earlier, suggests a small overall increase, but higher in Europe.

Figure 31: How do you think your organization's spending on the following products and applications in the next 12 months will compare with what was actually spent in the last 12 months?
(N=239, line length indicates "We don't spend anything on this".)



Looking at the spend indicators on a net basis, i.e., those planning to spend more minus those planning to spend less, and ignoring those spending the same, workflow and BPM is highlighted as the hottest area, which it has been in many previous years' surveys. This is followed by mobile applications in general, then mobile capture specifically. There is still strong growth intention in AP and AR automation, although only marginally more than capture systems in general. Outsourcing rates as 7% net overall, but for Europe rises to 21% net.

Figure 32: Net spending intentions in the next 12 months, excluding "Same" *(N=239)*



Spend on workflow, mobile and OCR applications is set to increase. Outsourcing and scanner spend will be more variable.

Conclusion and Recommendations

The Paper Wars are on-going. Successes have been achieved on a number of fronts. Paper in the office is decreasing, and more organizations are adopting paper-free processes. However, progress is slow. Leadership and direction from above has been lacking, and there are still a few pockets of resistance amongst lawyers and accountants, particularly with regard to the perceived validity of digitally applied signatures.

However, as we have seen in this report, the benefits are clear: faster response to customers, citizens and staff; processes that are more efficient; greater visibility for process monitoring; and increasingly important, the availability of content for remote and mobile working. Adopters of paper-free processes are reporting an ROI of 18 months or less in 77% of cases. 60% achieve payback within 12 months. These are very encouraging numbers, and the highest we have ever measured. Capturing paper at the point-of-entry, with all-digital mail distribution, is not only possible, but it is bringing huge benefits to early adopters.

The troops on the ground are in no doubt about the importance of the battle. 41% feel that going paper-free is the biggest potential improvement for most processes in the business, but they also feel that better teamwork and coordination between departments would greatly improve the speed of progress. In addition, 48% feel that mobile capture and access to processes on the move needs to be addressed across the business.

To meet the changing expectations of customers and staff, organizations need to be responsive, agile and efficient. Business-at-the-speed-of-paper simply isn't compatible with the modern digital enterprise.

Recommendations

- Look at how paper enters your business, where it slows things down, where it clogs up the workspace, and where it restricts information access and process flexibility.
- Highlight the role that paper-free processes can play in business improvement initiatives, particularly customer response and customer experience management.
- Seek endorsement from above for policies on less-paper offices, and paper-free processes.
- Implement quick wins where electronic copies are being habitually printed as part of the workflow - for reference, for review, for signatures, or for file copies.
- If you have no existing paper-free processes, pick one to trial – AP perhaps – but be careful not to produce a single-point system with limited expansion.
- If you are unsure of your expertise, get a team member trained, or if you need some external input, consult a document process outsourcer and tap into their experience in your industry.
- Audit those existing processes that utilize scanning and electronic workflows. Ensure they are taking full advantage of OCR, data capture and integration with core enterprise systems.
- Pay particular attention to processes that use scan-to-archive, post process with a view to changing to a scan-to-process, up front approach.
- Look at your capture systems with a view to rationalizing around a single, more capable system, able to service multiple processes, with distributed access across multiple-sites and branches.
- Position that system “right at the door” as a digital mailroom, defending offices from paper, and ensuring the quickest possible conversion to electronic.
- Extend the paper-free concept further to the point of origination, whether that is a branch office, a shop or the mobile devices of your employees and customers.
- Above all, question how your organization is going to remain competitive in a mobile, always on, dispersed-workforce world if it clings to its paper-laden processes. Most businesses have hundreds of processes. It will be a long journey, but the benefits are clear, and the sooner you get started the faster you will realize the returns.

References

1. “Winning the Paper Wars - capture the content and mobilize the process troops.”
AIIM Industry Watch, July 2013, www.aiim.org/Paper-Wars-2013

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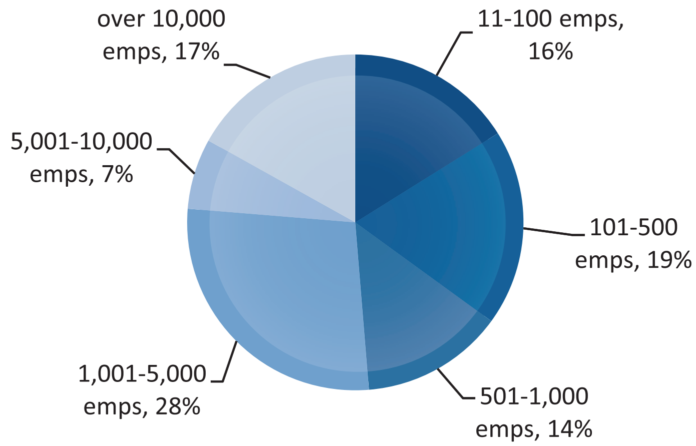
Appendix 1: Survey Demographics

Survey Background

The survey was taken by 444 individual members of the AIIM community between Sept 12, and Oct 07, 2014, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 80,000 AIIM community members.

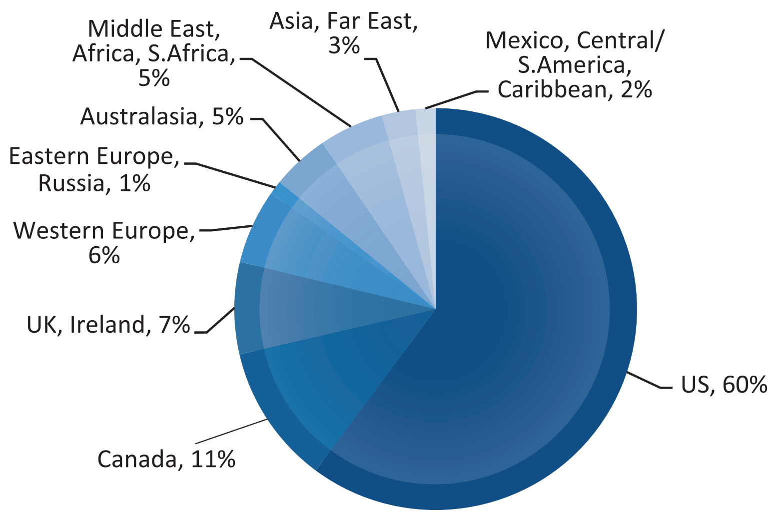
Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 24%, with mid-sized organizations of 500 to 5,000 employees at 42%. Small-to-mid sized organizations with 10 to 500 employees constitute 35%. Respondents from organizations with less than 10 employees and suppliers of ECM products and services have been eliminated from the results, taking the total to 366 respondents.



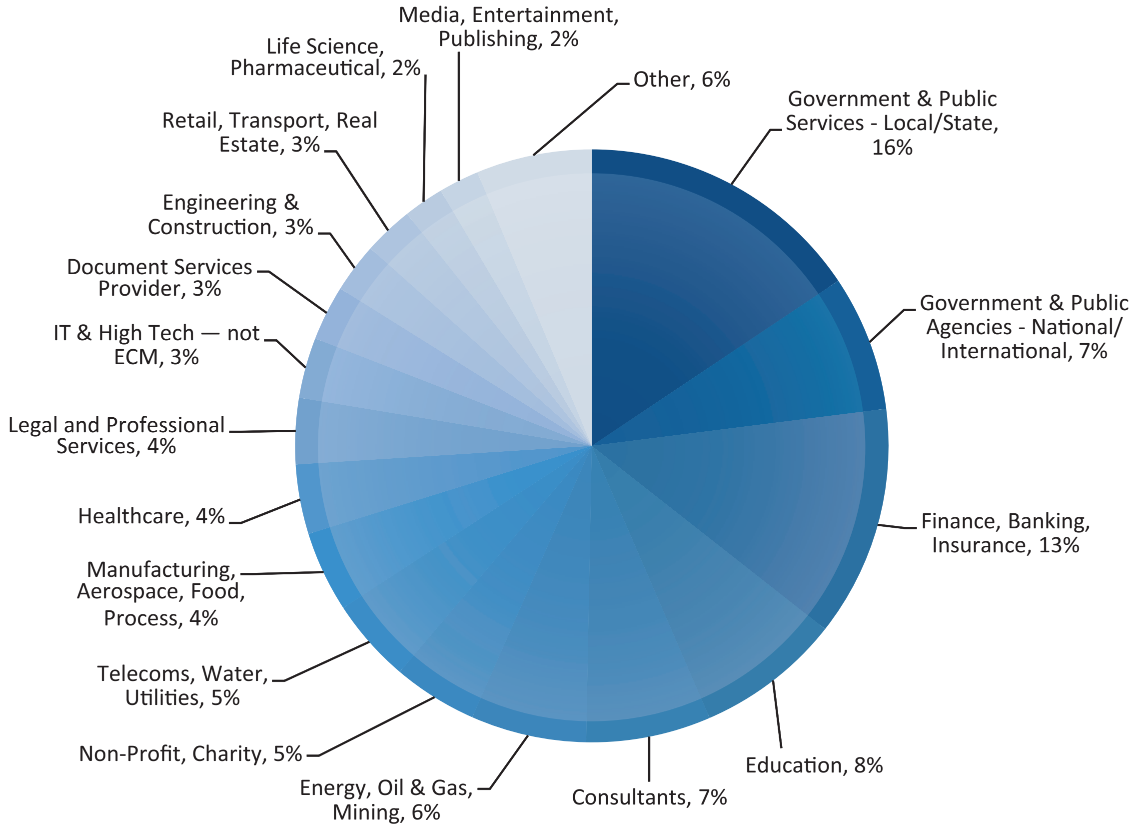
Geography

71% of the participants are based in North America, with 14% from Europe and 15% rest-of-world.



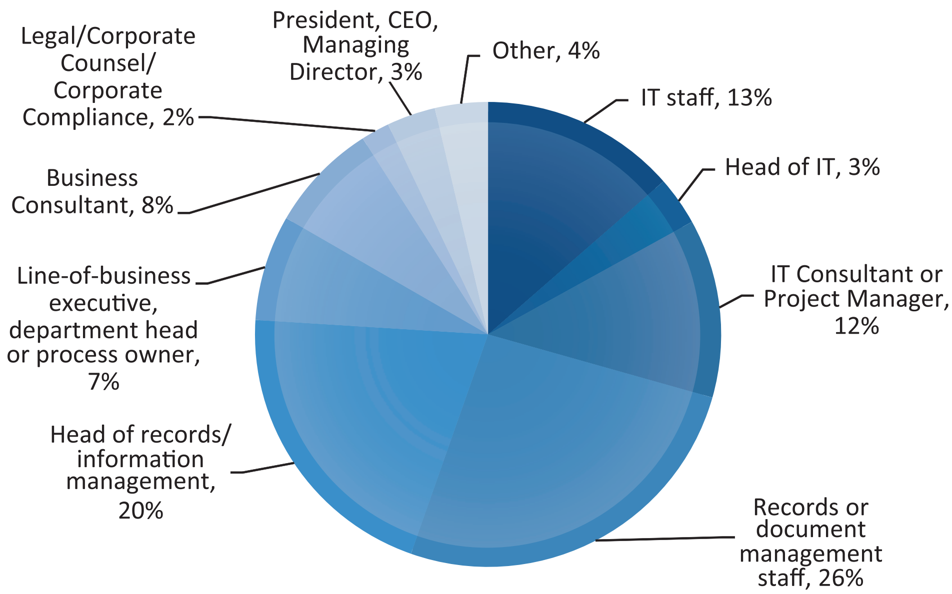
Industry Sector

Local and National Government together make up 23%, Finance and Insurance 13%, Other sectors are evenly split.



Job Roles

28% of respondents are from IT, 46% have a records management or information management role, and 24% are line-of-business managers or consultants.



Appendix 2: Selective Comments

Do you have any general comments to make about your capture systems and mobile deployments? (Selective)

- Want to begin to use mobile capture in the field for Daily Work Reports.
- We are already very paper-less.
- Very hard to convince the people to come out of their comfort zone. Most users are not ready to visualize life without paper.
- Paper files have been reduced dramatically and we are planning to increase our use of mobile capture.
- The push to go mobile is on. Budget constraints will determine timing and priorities.
- We're a small company for which most paperless systems are a greater burden and cost than continuing to use paper.
- We need to be able to authenticate and certify a scanned document as an original once in a digital form so if it is altered, a scan can prove the original document has been tampered with.
- In 2010 we lost 80% of our Records staff (100 to 20); we migrated all records to digital. We eliminated paper-print services with digital data to digital copy conversion. We've been able to sustain our business operations using digital copy - despite, the loss of $3.3 million in personnel resources; and realizing a $200K gain in reduced paper/toner needs.
- Culture in the past has not supported the kinds of changes required to move to a true paperless environment. Lack of ability to "prove" the authenticity of the signature has been problematic.

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EMC Corporation is a global leader in enabling businesses and service providers to transform their operations and deliver IT as a service. Fundamental to this transformation is cloud computing. Through innovative products and services, EMC accelerates the journey to cloud computing, helping IT departments to store, manage, protect and analyze their most valuable asset — information — in a more agile, trusted and cost efficient way.

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The goal is to capture data and information contained in documents, which are relevant to business processes and to make it easily available while reducing operating costs.

On the basis of the flagship product IRISXtract™ for Documents I.R.I.S. offers solutions for automatic invoice and order processing, HR and supplier records as well as case management in legal, healthcare, and finance sectors. With a clear focus on classification and extraction of unstructured content, I.R.I.S. could establish a prime position in the area of automatic data capturing and processing. IRISXtract™ for Documents is designed in a way which ensures that all customer and industry specific requirements and guidelines are observed.

Solutions for automation based on IRISXtract™ for Documents as well as the company-owned core technologies (e.g. OCR) that are part of it are sold, installed and operated via partners all over the world. With our partner concept we focus on four target groups:

Value Added Resellers (VAR), who integrate IRISXtract™ for Documents as a capturing component in their business process solution, to distribute and implement it independently;

Business Process Outsourcers (BPO), who provide services of document classification and data extraction based on IRISXtract™ for Documents to their clients;

Shared Services Centers (SSC), who provide capturing services within their own organization;

Original Equipment Manufacturers (OEM), who integrate I.R.I.S core technologies for e.g. OCR, classification, capture and data extraction into their applications to distribute it under their own name.

www.irisxtract.com

About ibml

Do you still have a lot of paper coming into your organization, slowing down your operations, creating security risks and costing you money? Is your legacy scanning system inefficient and outdated while charging you high maintenance costs? Then talk to the company whose high-performance scanning and capture solutions get rid of hundreds of millions of paper pages every day, used by organizations to transform paper into the purified digital information that is vital to support today's business processes.

ibml is a global provider of end-to-end information capture solutions, combining our ImageTrac® intelligent scanners and other scanners with SoftTrac® Capture Suite, our advanced capture software, and professional services. Every day, our solutions are used in over 45 countries in the most demanding document capture environments to reduce document preparation, speed up access to data, reduce exceptions, and improve operational control and visibility.

We are information capture experts who are focused on solving the operational requirements and challenges of capturing content from documents, and providing the most accurate and complete data possible to back-end content management and enterprise applications. We provide the highest performing scanning and capture hardware and software solutions on the market.

We back up this unique approach with a company culture of customer satisfaction, and an adaptable and knowledgeable team. Whether it's ibml product development, marketing, manufacturing, sales, delivery or support, operational excellence underlies everything we do.

Why do companies continue to choose ibml?

- Over 20 years delivering high-performance capture solutions
- Collaborative approach with partners, end users and BPOs
- Market leadership
- Choice and flexibility
- Alliances with industry leaders
- Proven methodology
- Proven return on investment

www.ibml.com

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About Iron Mountain

With Iron Mountain Records Management services, you'll have the resources you need to effectively store and safeguard your information assets. By leveraging our proven capabilities and best practices, you'll be able to:

Keep it safe. Employ storage processes designed to protect your critical records from a myriad of internal and external threats.

Get it when you need it. Classify, store and track your records online, following proven best practices, so you'll be able to retrieve a particular piece of information as efficiently as possible.

Manage with experience. Leverage the insights and expertise needed to maximize scarce resources and make records management a seamless extension of your everyday operations.

Records Storage - Leverage our network of records storage facilities to safeguard your information using advanced environmental security and access controls. Your records will be tagged and classified using your own terminology and made available on our intuitive Iron Mountain Connect™ web portal, helping you quickly locate and retrieve the information you need.

Document Imaging - Digitize your hardcopy records using our Document Conversion Services, which enable you to design a scalable imaging program that scans your records on either an upfront or as-needed basis — and makes them readily accessible across your organization.

Secure Shredding services provide onsite or offsite destruction programs that are available on an ongoing or project basis, helping you dispose of information in a compliant, reliable and cost-effective way.

Records Management Consulting - Consulting Services provide the insights you'll need to establish, manage and customize your records management program. You'll have access to expertise that helps you address the complexities of complying with the growing number of state and federal regulations governing records management.

Records Management Technology - Turn to Accutrac® Software to consistently manage the lifecycle of your records. When your records move between your office and our storage facility, they will be protected by InControl®, our patented technology that safeguards information in transit and delivers an auditable chain-of-custody.

www.ironmountain.com

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. For more information, visit kofax.com.

www.kofax.com

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About OPEX Corporation

OPEX® Corporation understands efficiency. We are in the business of helping your business increase productivity while lowering operational costs. For forty years, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organizations worldwide. As a global technology leader, OPEX is uniquely positioned to meet the challenges that our customers face in the document imaging, mail automation, and material handling industries.

From Document Conversion Services to Mobile-Scanning to Digital Mail Centers, Falcon by OPEX Corporation is the only prep-reducing scanner on the market to combine all your scanning needs into one universal document scanning workstation. Whether scanning stacks of documents, boxes of files, or opening and imaging daily volumes of mail, our scanners are specifically designed to significantly reduce or eliminate labor-intensive document preparation. We have proven that minimizing prep, paper handling, and other manual tasks not only improves efficiency, but also results in superior document integrity. A true investment, Falcon is the only scanner you will purchase that will pay for itself in labor savings.

Our commitment to meeting the needs of its customers does not stop with a product sale. The OPEX Service Organization boasts unrivaled technical support on a worldwide basis utilizing its vast network of locally based, factory-trained, direct-employee field technicians.

For more information on our prep-reducing scanners, visit www.opex.com

www.opex.com

SPS
a Swiss Post company

About Swiss Post Solutions AG

Swiss Post Solutions, a division of Swiss Post, offers a comprehensive range of document and business process outsourcing services. With 7’200 people working across Europe, North America and Asia and with access to an extensive partner network, we are able to support our clients across the globe. Private and Public sector organizations have chosen to outsource their physical and digital document processing needs to us, utilizing our extensive knowledge of people-based outsourcing and our capability to deliver document processing services on, near or off-shore. Our corporate information management system is a unified delivery platform that provides organizations with the ability to cost-effectively on-board and distribute documents throughout the organization. It provides our clients with the capability to:

- Simultaneously improve productivity and reduce operational costs
- Take an enterprise-wide approach to automating business processes
- Enable improved decision making and customer satisfaction by accelerating business transactions
- Reduce the risk of non-compliance and achieving legislative and regulatory requirements
- Regardless of document type, physical or electronic medium, format, language or geographic location, Swiss Post Solutions offers an end-to-end solution from document creation to content management, production, distribution and business intelligence.

www.swisspostsolutions.com

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Spigraph

About Spigraph Group

Spigraph is the leading document capture solutions and services provider in EMEA. In addition to its portfolio of document scanners from the world's leading manufacturers, Spigraph provides its growing customer base with tailored capture solutions to automate document-centric processes such as invoice processing, mailroom automation, mobile and web capture and many more. Spigraph services include consulting, implementation, maintenance and support to help organisations to achieve the highest possible level of process automation with a rapid return on investment.

Headquartered in St-Quentin-Fallavier, France, and with sales and service organisations across 20 countries in Europe, the Middle East and Africa, Spigraph serves approximately 6,000 authorised partners and more than 40,000 customers in over 40 countries.

Learn more about the value of document capture for your organisation by contacting us at www.spigraph.com.

www.spigraph.com

AIIM Scanning and Capture Resource Centre

Learn how to scan documents, automate data extraction, and drive paper out of your processes. These resources get you started.

PUBLICATIONS

Industry research reports, whitepapers, and toolkits

- **Putting Archived Content into Play**
- **Maximizing Your Content Value: Capture, Case Management, Compliance, Mobile Workforce**
- **Managing and Monitoring Business-Critical Content and Capture Applications**
- **21 Tips for Turning Chaos Into Opportunity**

PERSPECTIVES

Community insights, opinions, and discussions

- **Don't Forget the Hardware in Your RFP!**
- **Extending the Enterprise**
- **8 Things you Need to Evaluate in your Capture Operation**
- **I Can't Make THAT Decision!, an AIIM 2014 presentation**

WEBINARS

On-demand webcasts led by industry experts

- **Capture Anywhere-to-Process: The Need for Auto-Classification**
- **What Best-in-Class Organizations Know about Document Imaging and Capture (And You Should Too!)**
- **5 Rules to Do Mobile Capture Right**
- **Capturing the Value of Your Information and Data**
- **Advanced Document Capture – Here Comes The 2nd Wave**
- **Webinar: From Paper to Process: beyond document capture**
- **Webinar: Essential Document Imaging: capturing business value in 4 critical areas**

TUTORIALS

How-to videos developed by industry experts

- **How to Use Metadata and a Taxonomy to Improve Access to Information**
- **How to Automate Metadata Collection and Classification**
- **How to Establish an eForms Strategy**
- **How To Prepare For 35mm & 16mm Digital To Film Conversions**
- **How to Use Digital and Electronic Signatures**
- **How to Capture Blog Content as Records**
- **How to Capture Collaborative Content as Records**
- **How to Capture Facebook Content as Records**
- **How to Capture LinkedIn Content as Records**
- **How to Capture Twitter Content as Records**

EVENTS

Upcoming conference, seminars, and webinars

TRAINING

Courses based on industry standards and best practices

www.aiim.org/Resource-Centers/Scanning-and-Capture

The Global Community of Information Professionals

AIIM (www.aiim.org) AIIM is the global community of information professionals. We provide the education, research and certification that information professionals need to manage and share information assets in an era of mobile, social, cloud and big data.

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