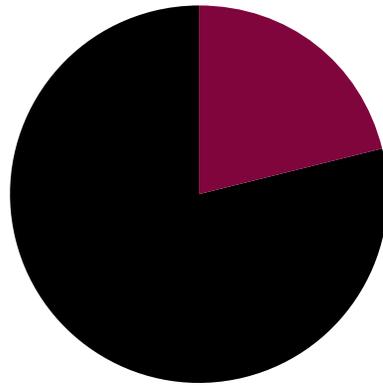


# How to Choose the Right Enterprise Automation Software

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Artificial intelligence (AI) and its related technologies are creating a sea of change, altering the way businesses simplify and expedite complex workflows. Processes like mortgage loan originations, benefits claims, and social services programs are prime candidates for automation, but with rising market pressure and climbing customer expectations, many established automation providers are struggling to keep up with the times. Furthermore, many organizations and government agencies continue to rely on outdated manual processes and legacy solutions that cause delays, clerical errors, and sunk costs—significantly impacting their profitability.



Worldwide Artificial intelligence (AI) software revenue is forecast to total \$62.5 billion in 2022, an increase of 21.3% from 2021<sup>1</sup>.

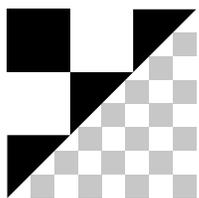
Considering the great promise of AI to transform the business world, what accounts for the technology lag?

One factor is “analysis paralysis.” Afraid of making the wrong decisions, companies elect to do nothing at all—setting them increasingly further back from competitors. And while the prospect of investing in and implementing a solution that sinks instead of swims is a justifiable fear, the best way forward isn’t inaction—it’s arming yourself with facts.

According to a recent McKinsey study, “The highest-performing companies made bolder investments in technology and possess stronger overall capabilities.<sup>2</sup>” In other words, when it comes to technological capabilities, the top performers are significantly ahead of their peers.

**This guide will assist you in creating a framework for understanding automation technologies, evaluating vendors, and choosing the right solution for your organization.**

**With the information provided here, you'll be well on your way to selecting a solution with a proven track record in data classification and capture, employee satisfaction, customer experience, and revenue.**



Billions of pages—application forms, enrollment documents, receipts, emails, and mobile images—are transmitted between organizations, their customers, and partners every year.

It takes an advanced automation solution to keep up with this pace and transform existing data classification and capture processes. Modernizing a tech stack and establishing an automation center of excellence (COE) requires prioritizing intelligent solutions that can handle diverse content types with a high degree of accuracy and minimal human interaction.

There's no shortage of companies (and even more employees) with bad memories of what happened when they tried the latest-and-greatest software craze. Applications that promised 100% automation and the elimination of paper documents instead turned out to be time-consuming and expensive disappointments—and ultimately failed to support the scale needed in an enterprise environment.



## What's Changed?

Advances in AI and machine learning (ML) have made automation applications exponentially more accurate and powerful. One major jump forward is how ML enables the automated processing of low resolution images, scanned documents, PDFs, and more—even with messy handwritten text, crossed out information, or other data degradations. By leveraging AI and ML, this form of automation is able to intelligently transform human-made content into machine-readable data that is actionable and accurate downstream in business processes.

Ask vendors for information related to their rates of accurate data extraction. If their rates are static (vs. continuously improving), and how the technology prevents clerical errors from reaching customers.

Established solutions have built in the ability to enhance distorted images, perform reorientation, and remove blank pages before processing, saving time and significantly improving the accuracy of extracted data. Solutions with the ability to enrich and affirm data speed up day-to-day processes, providing customers with a better experience and giving employees more time to focus on value-added tasks.

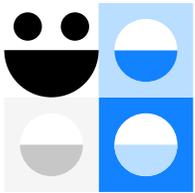
The image shows two examples of scanned forms. The first is a 'Social security number' field with the handwritten value '123-45-6789' and a trailing '9' that extends beyond the right boundary of the field. The second is a form titled 'Section 1 : Renseignements sur le demandeur' with fields for '1. Nom de famille du demandeur' (handwritten 'PAUZÉ'), '3. Adresse de domicile (numéro, rue)' (handwritten '1890 Boulevard des Laurentides'), and '5. Province' (handwritten 'Quebec').

*An account number or claims amount with one incorrect digit is useless, so look for a solution that measures accuracy at the field level and can distinguish between a name that has been crossed out or a Social Security Number that trails outside the bounding box.*

# Questions to Ask

- ✓ Can the solution extract data from low resolution, faxed, and distorted images (even those captured and uploaded from a mobile device)?
- ✓ Can the solution read multiple languages?
- ✓ Can the solution handle mixed entries (e.g., handwritten and printed text) at the same time?
- ✓ Can the solution verify content against information you already have on file to ensure it's correct and up to date?
- ✓ How does the solution measure and ensure accuracy across different content types?

## Prioritize Ease of Deployment and Use



An automation solution that enables seamless collaboration between humans and machines does more than benefit customers—it reduces time wasted on manual data entry and minimizes technological frustration.

In the last decade, ease of use has become a primary consideration when evaluating new technology. Solution teams no longer consist solely of IT team members or tech-savvy employees, and as such, applications have evolved to be much more user-friendly. By opting for solutions that are easy to implement, set up, and maintain, businesses can create a tech stack that encourages greater productivity and quickly achieves ROI.

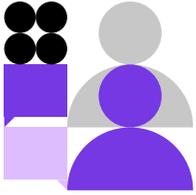
Technology purchases are only as good as how they're used—it's imperative to consider as many practical applications and use cases as possible. For example, are there specific user groups or access control permissions that need to be considered, or service-level agreements (SLAs) that must be maintained for compliance purposes? Identifying this type of roadblock early in the search for a new solution will prevent buyer's remorse later.

Once the right solution has been identified, the benefits go beyond ease-of-use. When organizations have better access to more data with fewer errors, employees can turn their attention to a broader range of tasks that will carry the business forward.

**Ask specific questions of prospective vendors based on the workflows you intend to keep and those you're planning on rebuilding. Bonus points for any vendors that get involved in mapping your current vs. future state processes.**

# Questions to Ask

- ✓ Has the solution been put through any end user testing as part of its development?
- ✓ Does the solution take into account non-technical users?
- ✓ How easy is it for the system administrator to perform tasks such as integrating new tools, changing data paths, or adjusting for new steps in your business process?
- ✓ How much analytical visibility does the solution provide for future improvements?
- ✓ How does its deployment maintain the privacy and security standards of your organization?



Modernizing your tech stack takes more than upfront investment—it's a process that also requires equitable partnerships. Beyond choosing a vendor with a proven track record, it's important to work with partners who are willing to share their vision for the future. When their vision aligns with yours, it's far more likely that the partnership will provide long-term benefits to both your companies.

AI is a complex, fast-moving technology, so the right solution provider will be committed to investing in the research and development needed to move their technology forward. Seek answers to how each vendor prioritizes investments in product, design, and engineering and how they provide their own team with tools for testing new ideas and keeping up with emerging trends.

**Staying one step ahead of your competition means that your enterprise tech needs to be at least one step ahead, too.**

Collaborative partnerships are mutually beneficial—the provider gets new business and the opportunity to refine their product offering, and you'll receive guidance on decisions, product development tailored to your business case, high-quality customer support, and more.

# Questions to Ask

- ✓ What level of investment does the vendor dedicate to their product's research and development and evolving technology?
- ✓ Does the vendor have a product roadmap and will they share it with prospects?
- ✓ What kind of support and services can clients expect?
- ✓ How does the vendor roll out new features and communicate them to existing clients?
- ✓ Are the objectives of your organization regularly considered when the vendor looks to evolve and expand their product?



It's understandable that companies still on the fence about the adoption of new tech wonder how much of their current infrastructure will have to change. Even when existing systems are dragging down performance, it's unnerving to contemplate all the changes that come with innovating for the future.

It's important to remember that digital transformation is an ongoing process, not a one-off initiative. A trusted solution provider will help strategize how to best roll out and implement their technology within existing infrastructure—and optimize it for sustainable success. It takes time to fully integrate new tech, but that process doesn't have to be painful. By starting with use cases that will make the greatest impact in the shortest time, businesses can minimize the impact to their operations.

A leading solution will deliver high rates of accuracy and automation from the start, and will continue to get better over time.

When it comes to customer satisfaction, automation flexibility provides scalability during periods of growth and change. Customers expect their submitted forms to be reviewed within days or even hours, not weeks. For individuals waiting on disbursements for their insurance claims, the difference between days and weeks can mean the prevention of needless financial stress and hardship.

Further, when changes arise due to market, regulatory, or business process flux, it's integral to ensure that the solution you're selecting is able to continue to provide value with minimal downtime.

**The top 5% of brands that scored the highest on Forrester's U.S. 2021 Customer Experience Index changed their approach to CX during the pandemic to meet core customer needs, such as digital transformation.**

# Questions to Ask

- ✓ How easy is the solution to set up, implement, and maintain?
- ✓ How does the vendor help strategize ways to enable the solution to easily fit within existing infrastructure?
- ✓ What are the potential economic benefits of implementing the solution?
- ✓ How do you calculate ROI and what factors are considered?
- ✓ What is the average time-to-value?
- ✓ How can we collaborate to create a more effective product for my organization?
- ✓ What is your vision for automation and the future of work, and does it align with our organization's vision for the future?

The many benefits of taking the plunge into digitally transforming your existing processes cannot be overstated. [Gartner has already predicted](#) that by 2024, the drive towards operational agility will lead organizations to adopt at least three out of the 20 process-agnostic types of software that enable hyperautomation.

Modernizing a sprawling tech stack can be a daunting prospect, but there's a great reward in store for those who take the plunge. Companies that embrace enterprise automation increase the speed and quality of their operations while cutting costs, mitigating risks, and boosting revenue.

**Looking for a partner in your vision for an automated future?  
See how the Hyperscience Platform's ML technology stacks up in  
your evaluation.**



Get a demo