

# Taking the leap into the Modern Workplace

## Follow the Path of the Wise....

San Diego ARMA Meeting 6/13/2019

Neal Fischer - Content Services Consultant

*Comptia CDIA+, AIIM ECM / SharePoint Practitioner*

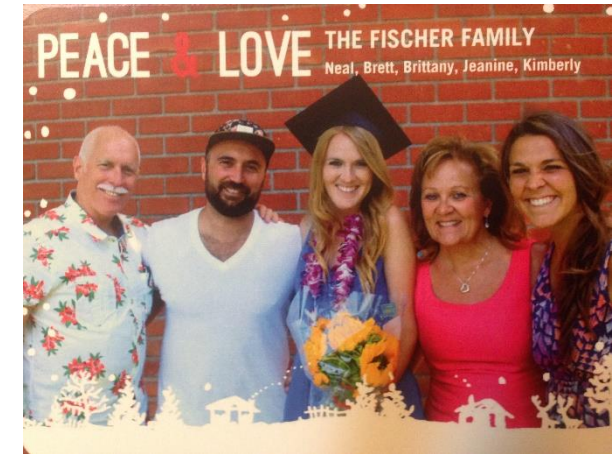
**Email: [nfischer55@gmail.com](mailto:nfischer55@gmail.com) Tel# 619 890 4223**





# Neal Fischer

- Business Process Automation Consultant / Digital Transformation Specialist
- Business Owner – Founded CommTech of SD & Hershey Technologies . HTI was A 24 year business focused on business process automation solutions. Sold to Konica Minolta Business Solutions in 2015.
- Family man, Love San Diego and Obsessed w/Customer success, Focus on client Solution & Create Long-term Relationships



# Abbreviated Client Listing

## Insurance & Finance



## Commercial & Healthcare



## Government

### Accenture Federal Services



**San Diego County Sheriff's Department**  
SHERIFF WILLIAM B. KOLENDER

"Keeping  
the peace  
since 1850"



**Metro**

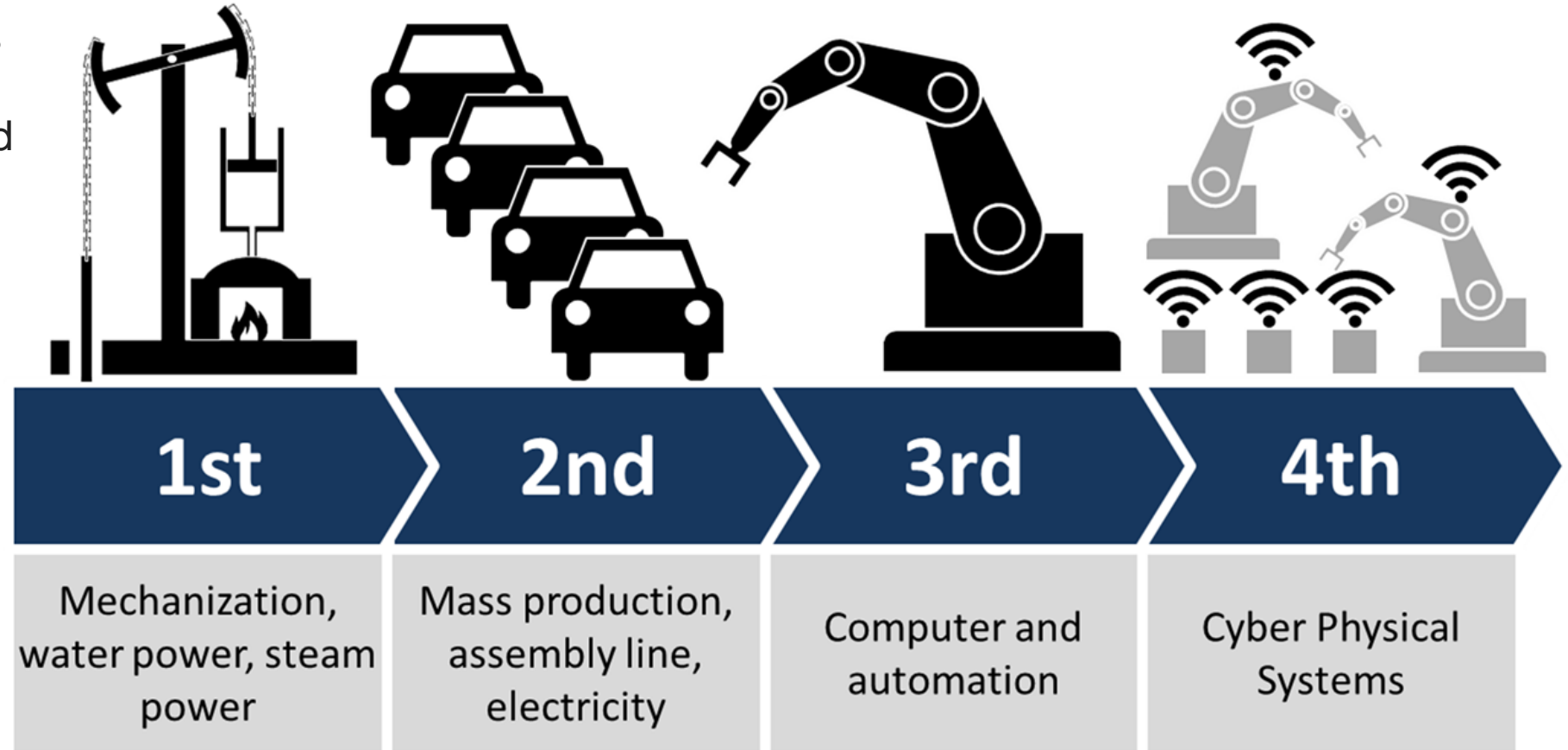


Public  
Utilities



# Modern Workplace & 4<sup>th</sup> Industrial Revolution

- Improve business processes
- Customer engagement
- Develop new capabilities and business models by using connected digital processes and or platforms.





# Why Are Organizations investing in Digital Transformation & how it affects the way people work?



# Can your Business Model Survive by Staying Status Quo?



URBAN  
TRANSPORTATION



SPACE  
TRANSPORTATION



HOSPITALITY



Pharmacy Chain



Telecommunications



Retail



ENTERTAINMENT

# DIGITAL TRANSFORMATION SUCCESS DEFINES TODAY'S LEADERS



Uber



Tesla



Digital Natives are Digital Disruptors....

# Trends impacting the way we work

## Devices



1 billion  
smartphones by 2016,  
350M of those being  
used at work

## People



82%  
of the world's online  
population engages in  
social networking

## Cloud



50%  
of enterprise customers  
are "on the road" to  
cloud

2016

2019

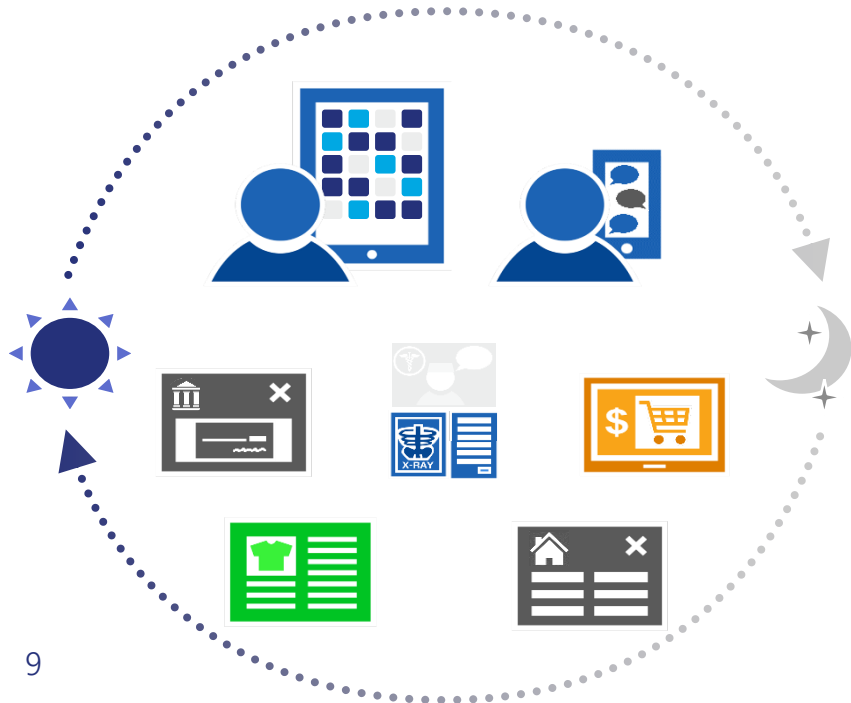
### IDC Reports

- Firms will businesses will spend 1.8 Trillion dollars by 2021 to modernize IT platforms in order to support customer centric digital engagement.



# Trends Driving Digital Transformation

- Mobility has changed everything
- Customers live in the **always-on**, app-driven world.
- Access to information and frictionless customer engagement must be delivered 24/7 across myriad touchpoints and line of business applications.
- Winners will be decided by their systems of engagement- speed, flexibility, and ease of adoption.



**Gartner**

By 2019, U.S. customers' mobile engagement behavior will drive U.S. mobile commerce revenue to 50% of U.S. digital commerce revenue."

Mobile will affect more than just digital operations; it will transform your entire business .

# Trends Driving Digital Transformation

Organizations are struggling to integrate new mobile technology with existing legacy systems.

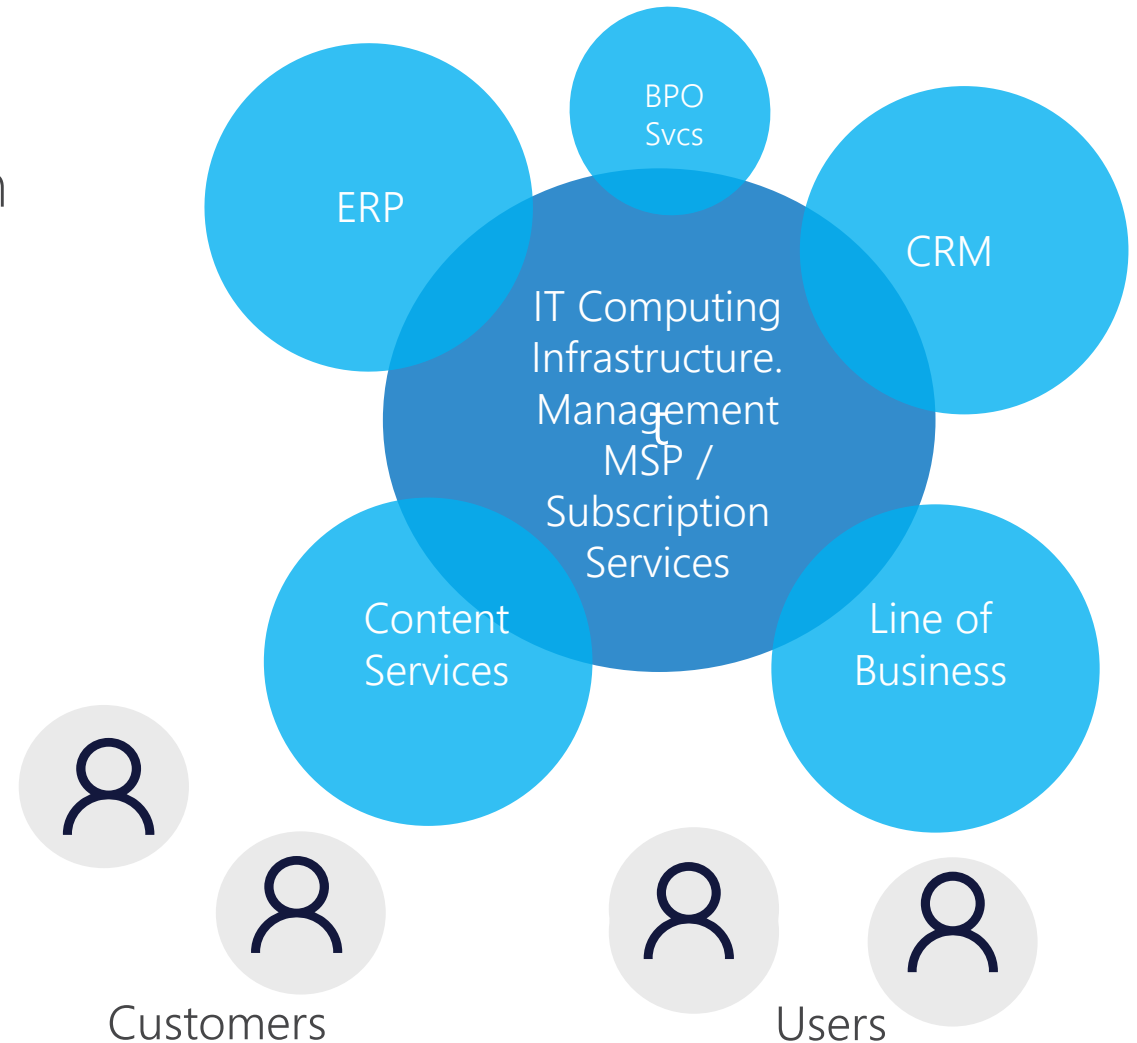
Current legacy systems do not easily scale, often relying on manual non-integrated component systems.

Customers, constituents and business partners are more demanding.

Lower cost / highly skilled Service Providers (BPO)

Disruptive competitive threats.

Subscription Services – Flexible Engagements



# Business challenges...

Acquire, retain employees, clients,  
business partners and expand IT  
support capabilities



Streamline operations to be more cost  
effective and compliant

Improve the client engagement  
experience



Can both be achieved together?



# Old IT World

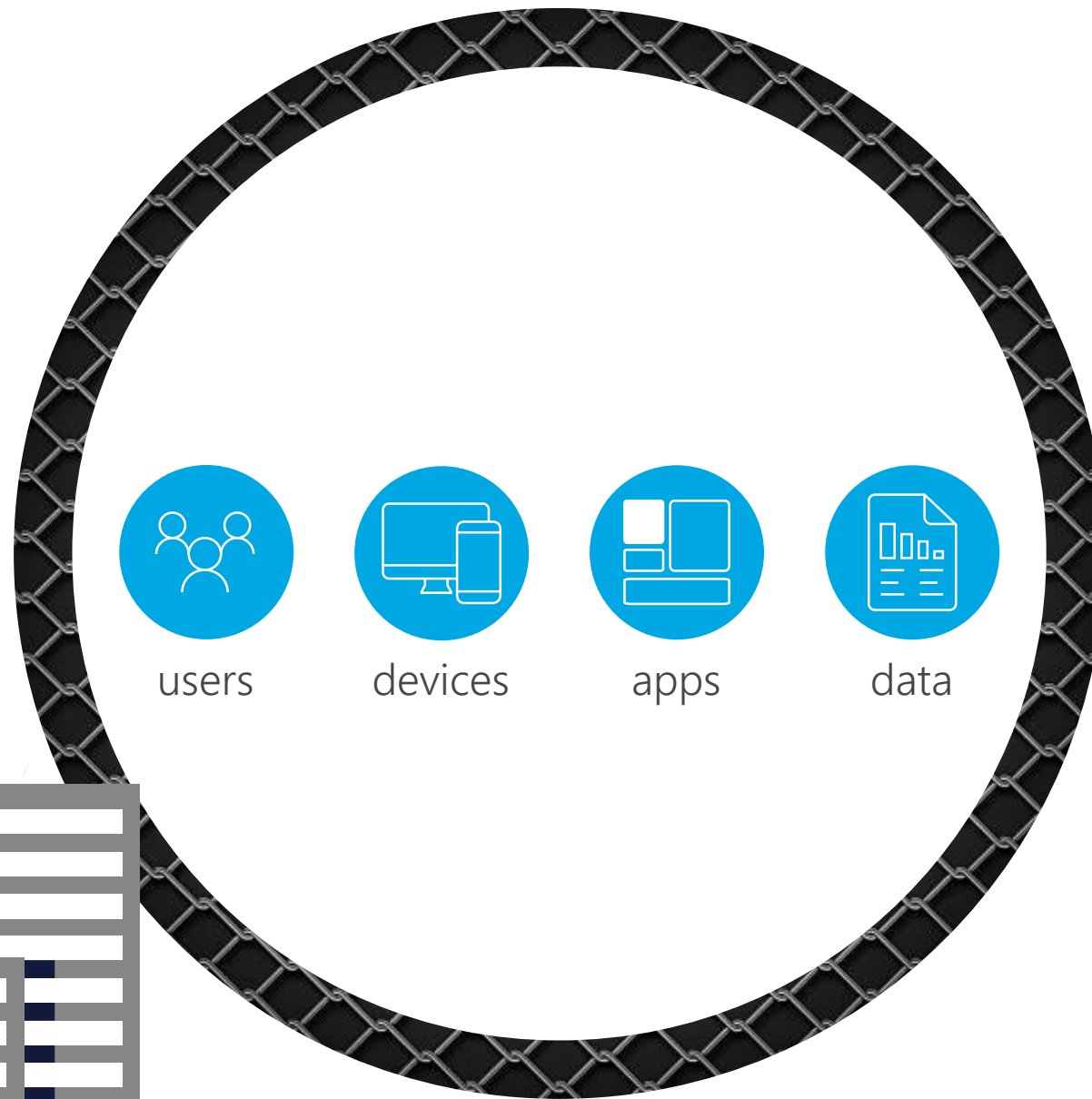
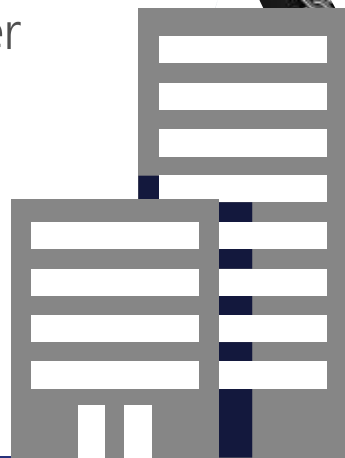
On-premises / Private cloud

Costly & complex

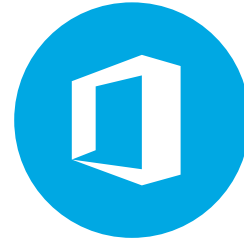
IT deployments lacked ability to improve overtime.

Required on-going LOB expertise and funding to support SW Upgrades.

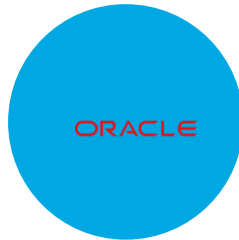
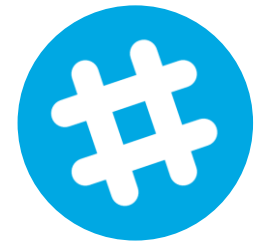
Often disruptive to user community.



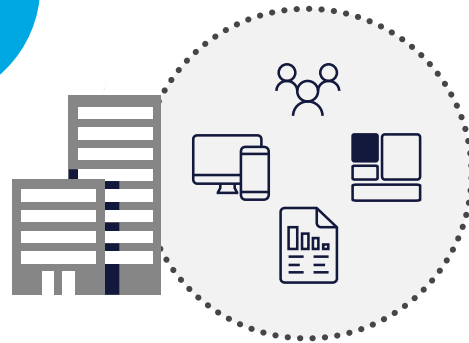
# New Modern World



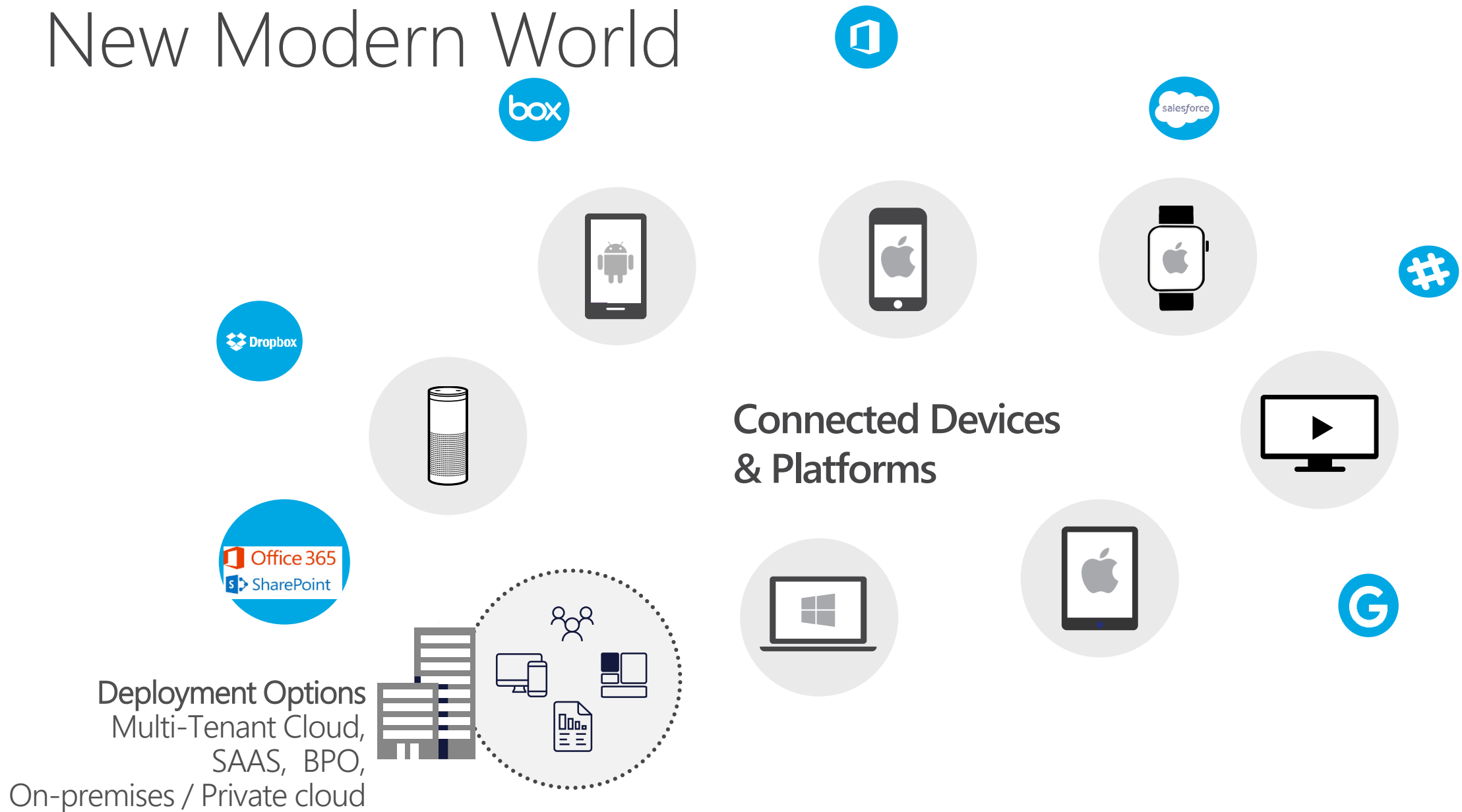
One Cohesive  
Customer Centric  
Interoperable  
Digital Platform



Deployment Options  
Multi-Tenant Cloud,  
SAAS, BPO,  
On-premises / Private cloud

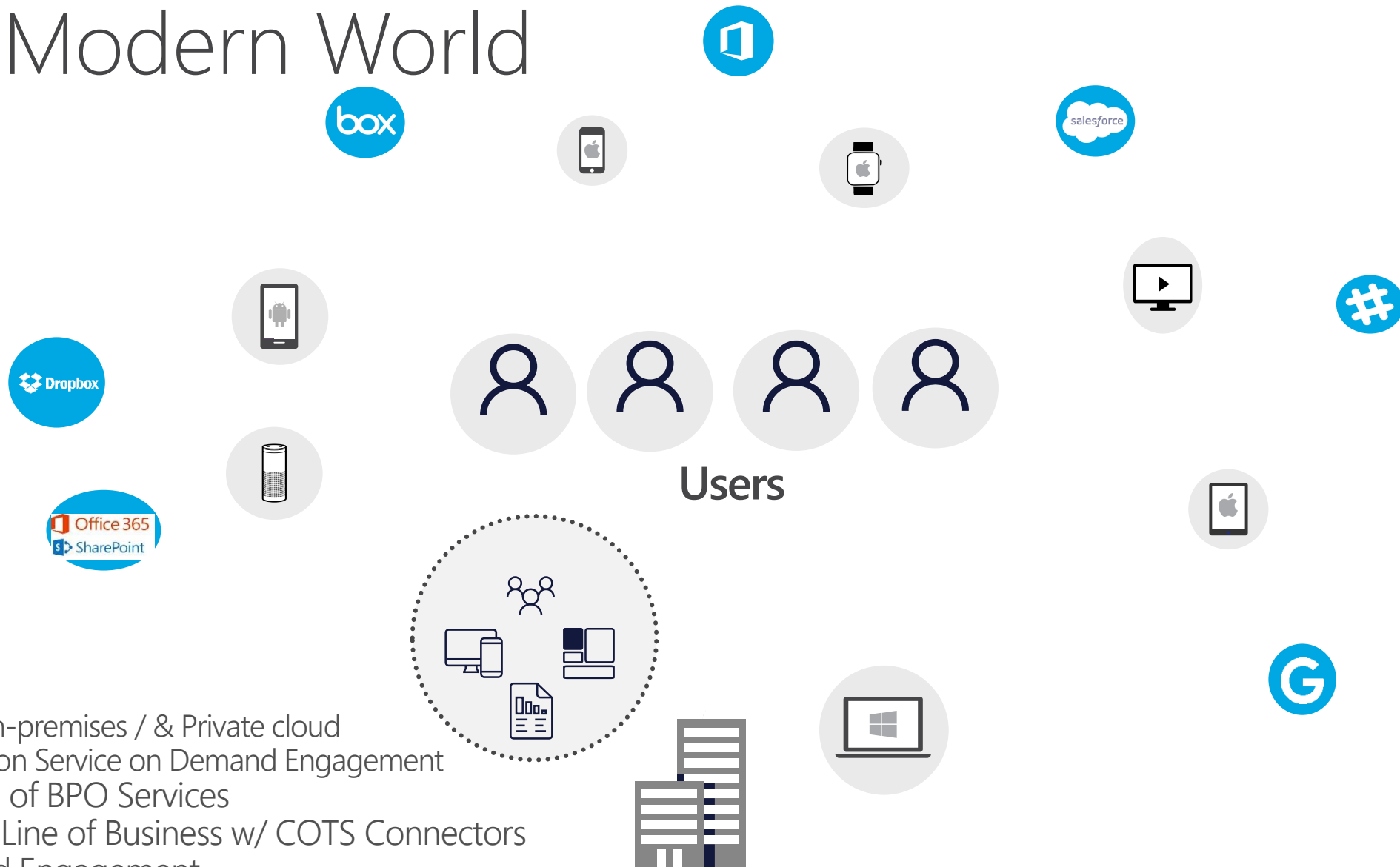


# New Modern World



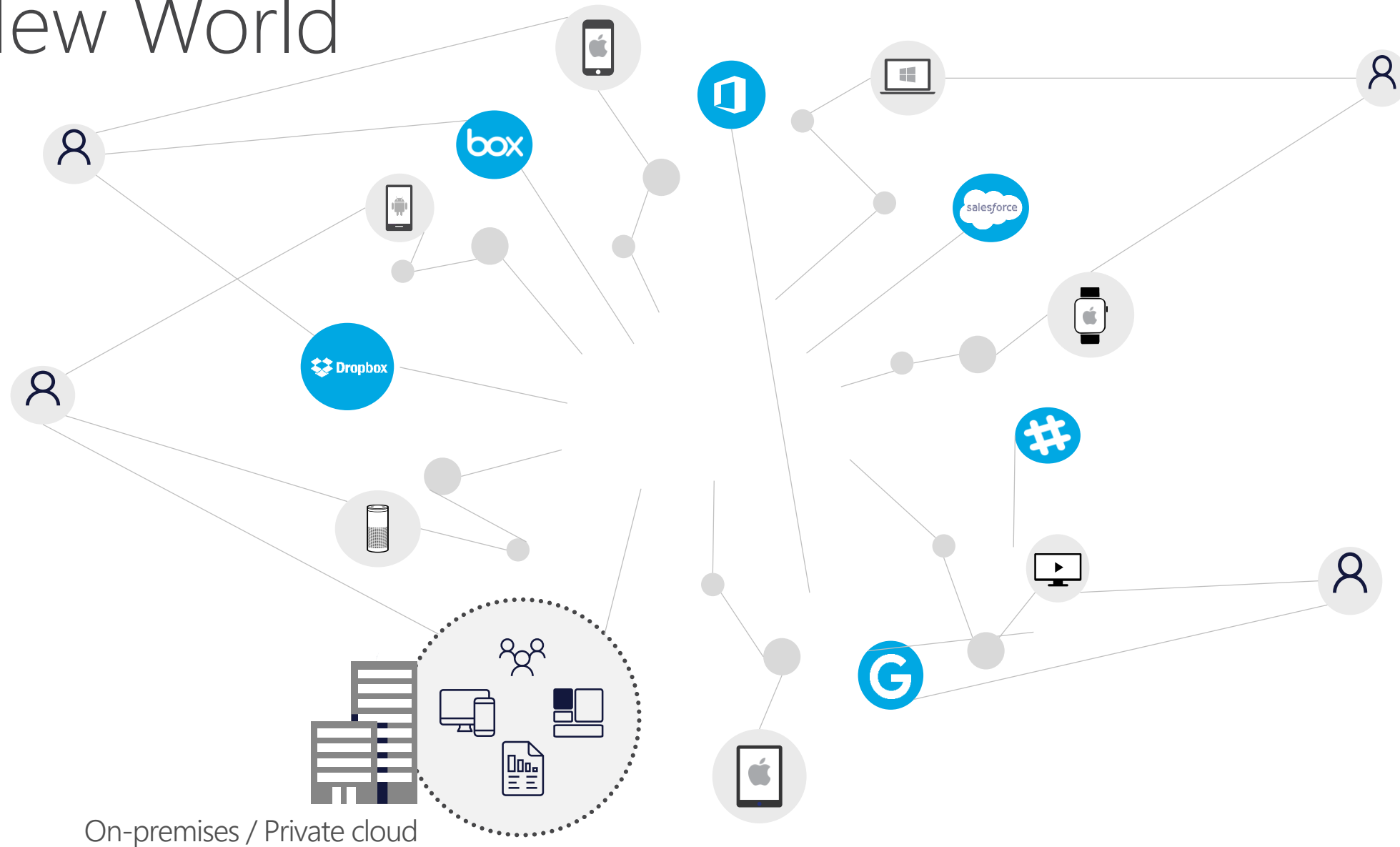


# New Modern World



- Cloud SAAS, On-premises / & Private cloud
- Agile Subscription Service on Demand Engagement
- Increased Use of BPO Services
- Best of Breed Line of Business w/ COTS Connectors
- Client Focused Engagement

# New World



## Where to Start ?

Remove & Replace entire Business Platforms, Line of Business Applications, Middleware Components, Outsource ?





# Principals to Modernize Technology

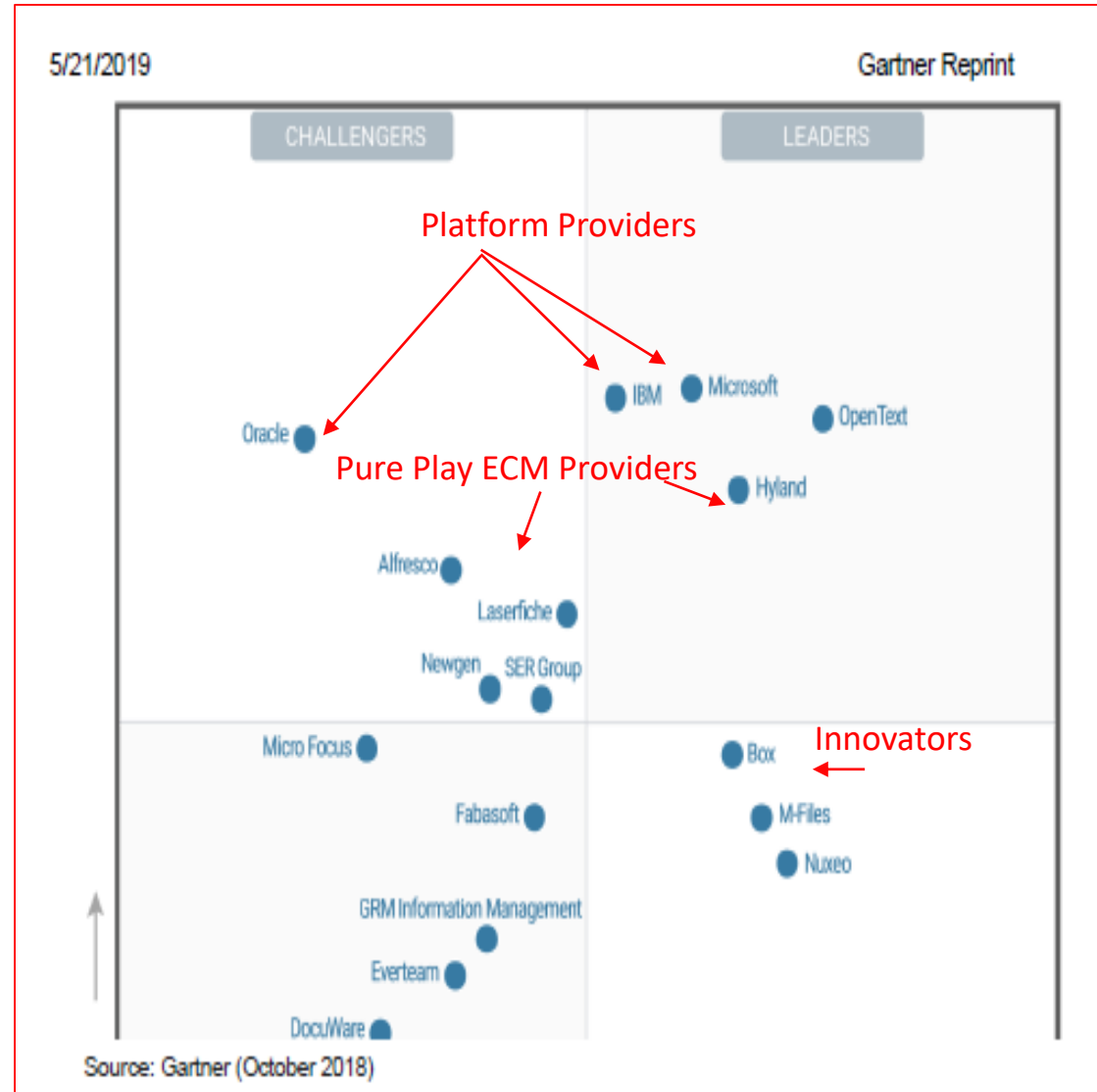
1. Define your organizations roadmap. What does DT mean to you? Who in the organization is most affected?
2. Engage cross-functional teams to create modernization road map to ensure visibility, shared vision and access to SME's and extended stakeholders.
3. Audit existing infrastructure and LOB applications that are constraining the speed and flexibility of the organization.
4. Be open *to change* .....review new models to meet IT service requirements.
5. Adopt a services mind-set. Consider SAAS, BPO, and minimize risk through partner engagement (FSR, POC) to validate investment value
6. Audit system and user requirements for BARE minimum offerings focus on being agile, with shorter IT lifecycles and user centric focus.
7. Customer and worker value should be measurable: retention, user experience, productivity, improved recruiting, increased sale\$.
8. Acknowledge that tomorrow's IT Systems will be deployed faster with lower complexities.
9. Build in funding for user training, & on-going system optimization.

# Sample Digital Transformation Service Markets

Component Approach

Content Services (ECM) Providers

Systems that collect, manage, search, share and deliver content : images, text, rich media via multiple channels.



# Sample Digital Transformation Service Markets

## ERP Accounting Systems

that support enterprise resource planning focused on financial, services and manufacturing process management tools.

## Digital Transformation

Opportunities include use of capture, workflow and content mgt services.



Cloud 1<sup>st</sup> Innovators



# Sample Digital Transformation Service Markets

## Robotic Process Automation (RPA)

that support a digital workforce designed to replace redundant manual often “error prone” human tasks. RPA “bots” are often rules based processing models designed to follow structured computer pathways interacting with business applications that have high transaction rates.

Focus on Outcomes not labor reduction

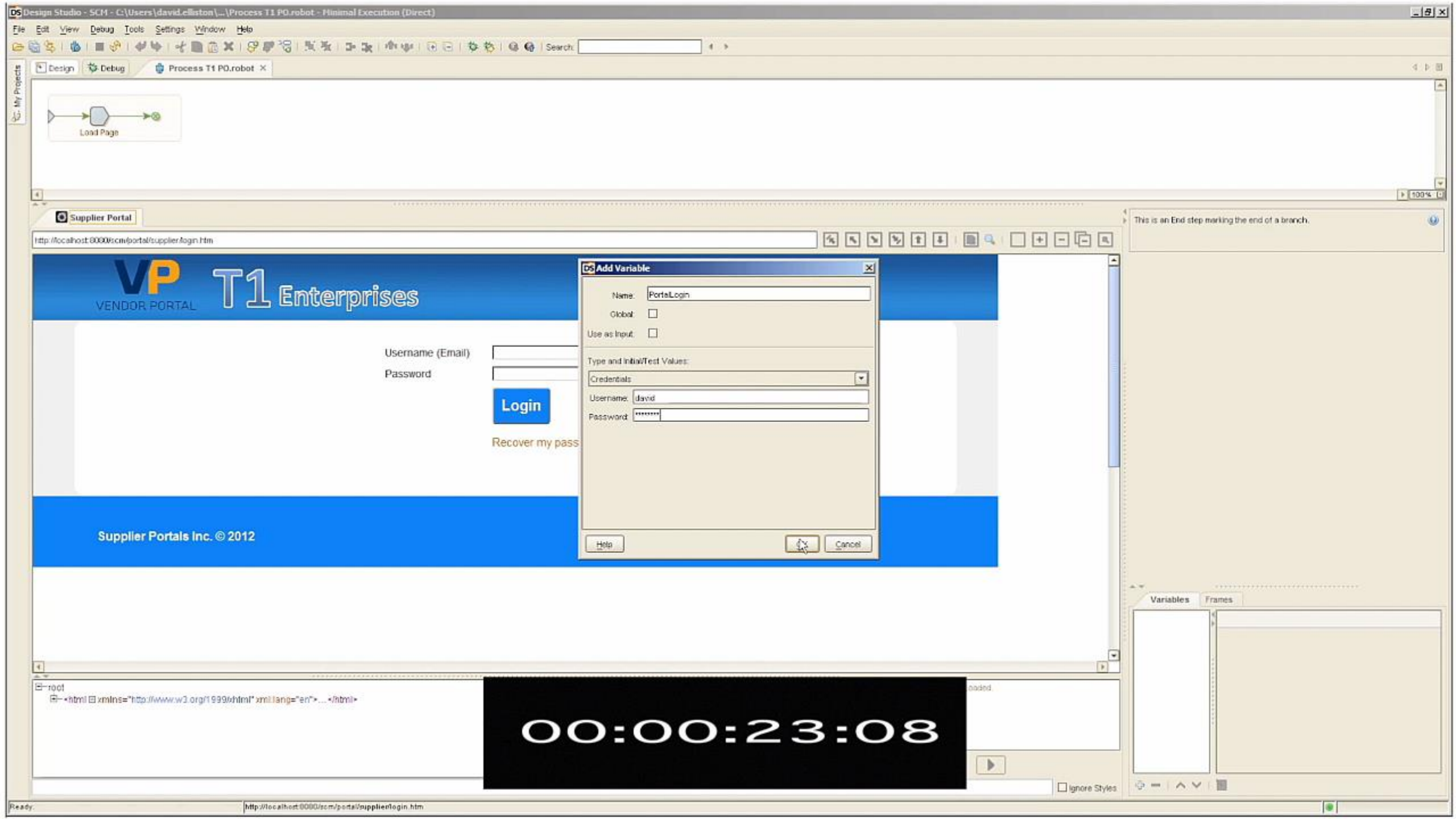
- Client engagement/ experience
- Improved Quality
- Higher staff productivity

Table 1: Indicative Listing of Types of RPA Tool Vendors

Specialist RPA Software Providers ↓	Software Providers With Multiple Software Products, Including RPA ↓	IT or BPO Service Providers That Provide Proprietary RPA Software Platforms ↓
AutomationEdge	AntWorks	Another Monday
Automation Anywhere	HelpSystems	Cognizant
Blue Prism	Infosys (EdgeVerve Systems)	Conduent
Contextor	Jacada	Sutherland
EnableSoft	Kofax	Syntel
Epiance	NICE	Tech Mahindra
Kryon	Pegasystems	
OpenConnect	Perpetuuiti	
Softomotive	Verint Systems	
UiPath	Redwood Software	
	Servicetrace	
	SpiceCSM	
	Winshuttle	
	WorkFusion	
	NTT Advanced Technology (NTT-AT)	

BPO = business process outsourcing; RPA = robotic process automation

Source: Gartner (June 2018)



# Sample Digital Transformation Service Markets

## CRM Systems

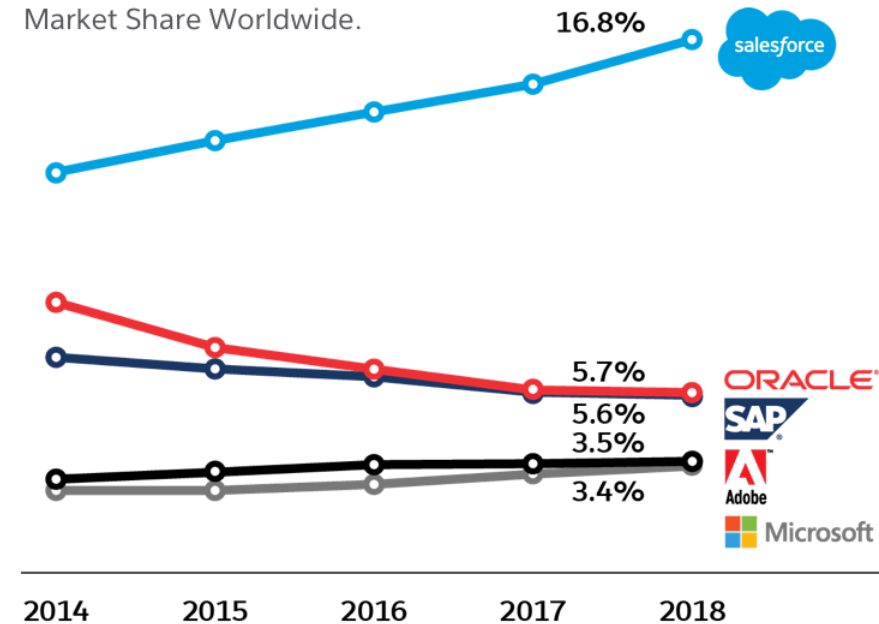
that support enterprise customer relationship management with marketplace that offers information sharing with other line of business applications.

## Digital Transformation

Opportunities include use of digital document generation, analytics, workflow and content mgt services.

## Ranked #1 for CRM.

Ranked #1 for CRM Applications  
based on IDC 2018 Revenue  
Market Share Worldwide.



Source: IDC, Worldwide Semiannual Software Tracker, April 2019.

# Capture Services Market Opportunity

**Providers that collect/ capture content from multiple channels (fax, paper, forms, email, WEB portals) and deliver in an actionable digital format.**

## **Software Providers**

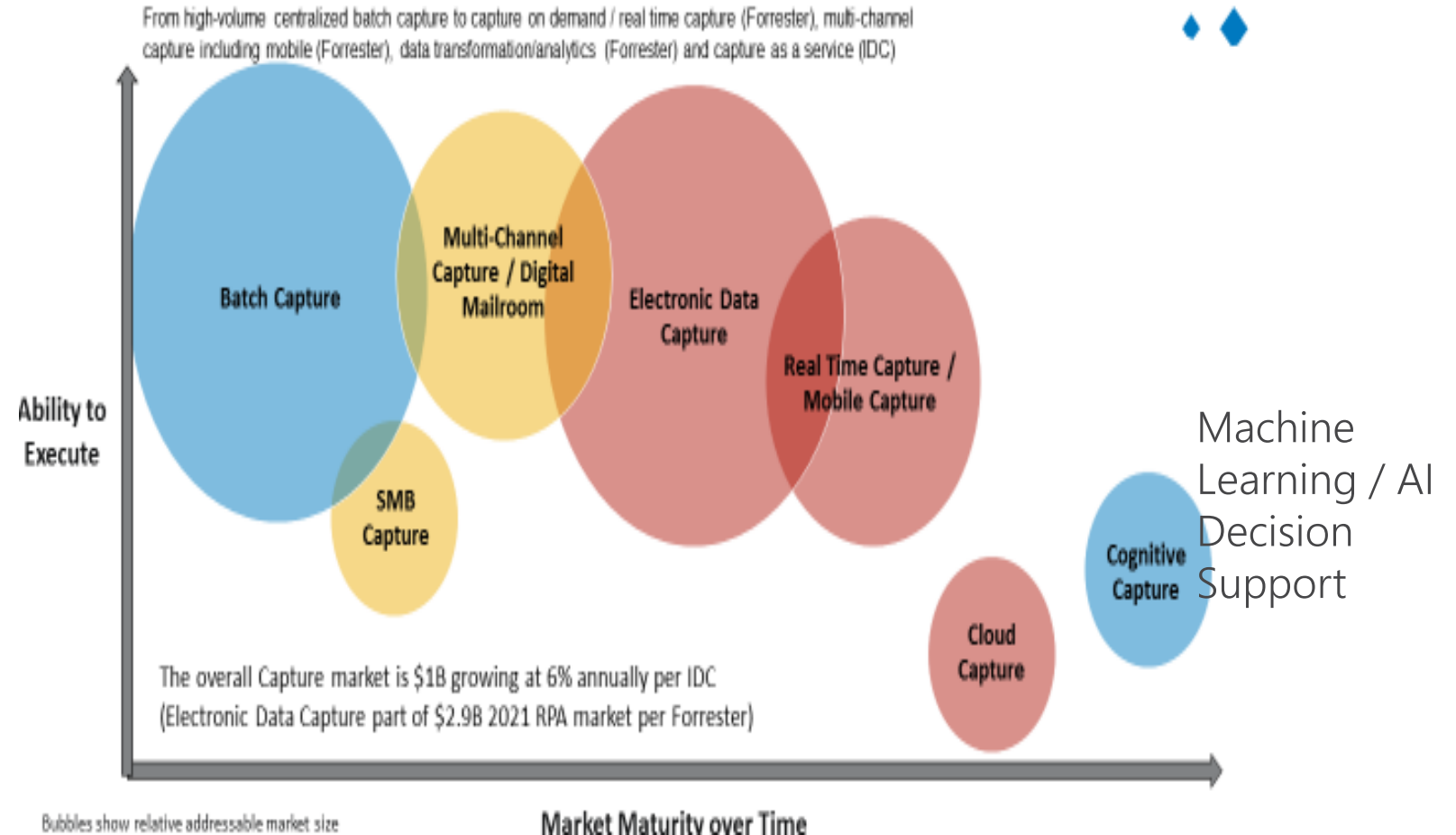
Kofax, Hyland, EpheSoft, IBM DataCap, Oracle OpenText, Abbyy, Psigen, Google,

**MFP & Scanner Mfgs** – Sharp, Konica Minolta, Xerox, Ricoh, Brother, Lexmark, Canon, Kyocera, Fennastrae Udocs

## **BPO Capture as Service Providers:**

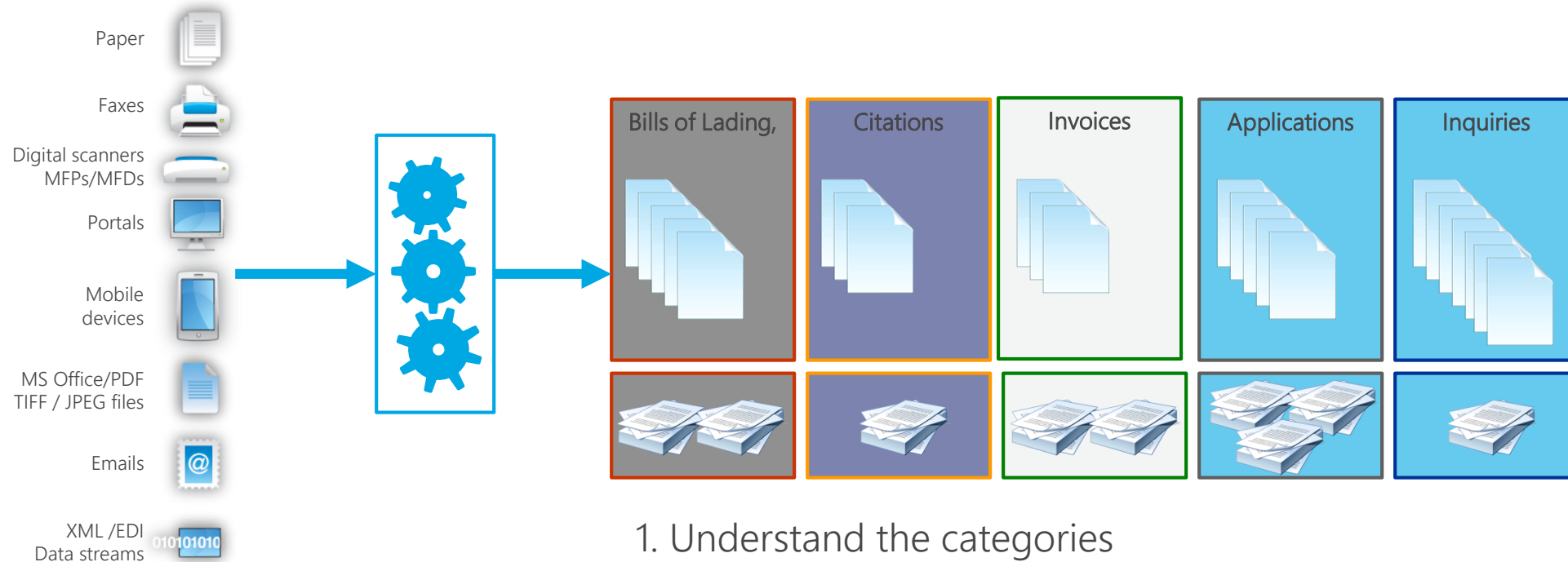
Exela Technologies, Iron Mountain, SwissPost,

## Advanced Capture market sub-segments & dynamics



# Digital Workforce SW System

Automatic classification - removes the need for document analysis and sorting  
Learn-by-example machine learning techniques make this quick to configure and simple to maintain





# Digital Transformation Services

- Automatic Classification & data extraction – removes the need for manual sorting & data entry
- Scan paper documents and Import electronic documents from multiple channels – email, FAX, Web Portals, & File Systems, Mobile Devices, WEB Service API's
- Mature OCR extraction technology locates and extracts data from any document
- Highly scalable recognition engines – Form ID, machine print, handprint, mark sense, barcode (1d,2d)

HEALTH INSURANCE CLAIM FORM

1. NAME: [Redacted]

2. ADDRESS: [Redacted]

3. DATE OF BIRTH: [Redacted]

4. MEDICAL HISTORY: [Redacted]

5. INSURANCE INFORMATION: [Redacted]

6. PHYSICIAN'S SIGNATURE: [Redacted]

7. PATIENT'S SIGNATURE: [Redacted]

8. DATE: [Redacted]

9. PRINTED MATTER

Structured Forms

Example Document

Jones Solicitors  
Station Court  
Station Road  
Buckingham  
New Hampshire  
B10 1J7

Telephone: (719) 643-2121  
Fax: (719) 643-2122

Partners:  
John Jones, LL.B.  
James Kestel, B.A.  
Margaret Glenn, LL.B.

Consultants:  
Clare Andrews, LL.B.  
Robert Martin, LL.B.

JAN 6 05

Dear Sirs,

We act in the proposed re-mortgage of the Property below. It is hoped to complete the mortgage on February 18, 2005.

We shall be grateful if you will provide us with a Redemption Statement calculated to the above date as soon as possible, together with a daily rate thereafter if applicable.

We will rely on the accuracy of the information provided and proceed on the basis:

1. that the figure which you provide to us includes all sums due to you secured on the Property on any account, including that shown in the heading of this letter; and
2. that you will release your Charge upon receipt of that sum.

Borrower: Simon Matthews  
Property: 6 Machine Street  
Unit 112  
Lakeland, OH 44123

Unstructured Correspondence

Talon Manufacturing Ltd.

THE ULTIMATE GRIP

INVOICE

Invoice Number: SIN017561

Due Date: 30/06/2003

Order Number: 378895

Account Code: GENST

Delivery Note Number: SEDEL7353

Stock Code	Description	Quantity	Unit Price	Discount	Total
YC015	15mm Nail in Clip - White	1,000	0.0981	50.00%	19.55
NCW02	22mm Nail in Clip - White	400	0.0455	50.00%	9.10
OPS15	15mm Snap-in Open Clip	400	0.0187	50.00%	3.74
QPS22	22mm Snap-in Open Clip	200	0.0258	50.00%	2.58
P1C17	Yellow Plug - Carded Talon	1	5.8000	70.00%	1.74
P2C1	Red Plug - Carded Talon	5	6.4000	70.00%	9.80
P3C1	Brown Plug - Carded Talon	7	5.3200	70.00%	19.57
TD15	15mm Talon Double Cap	50	0.0945	30.00%	3.31
TS15	15mm Talon Single Clip	100	0.0268	30.00%	2.78
TS22	22mm Talon Single Clip	100	0.0529	30.00%	3.71

Delivery Address (if different from above):

Net: 75.55

Total: 89.23

\* PAYMENT TERMS: Strictly last day of month following the month of invoice - unless otherwise agreed in writing

\* TITLE OF GOODS: The risk in the goods will pass to the buyer on delivery, but all goods remain the property of Talon Manufacturing Ltd until all outstanding monies are received

\* DISPUTES: Any disputes with this invoice must be notified to Talon Manufacturing Ltd in writing within 7 days of date of invoice

Registered Office: 72 Gabor's Hill, Maudsloe, Kent ME15 8TH  
Director: M. C. Dabney

VAT Reg No: 354 3644 87

Invoices/Orders etc.

American Express Company

123 Main St  
Anytown, USA 00000-0000

Date: 03/05/2003

1001

Pay to the Order of: \$

For: 0023415963183 1001

MASSACHUSETTS UNIFORM CITATION

Date of Offense: 03/05/2003

Citation Number: R 0355505

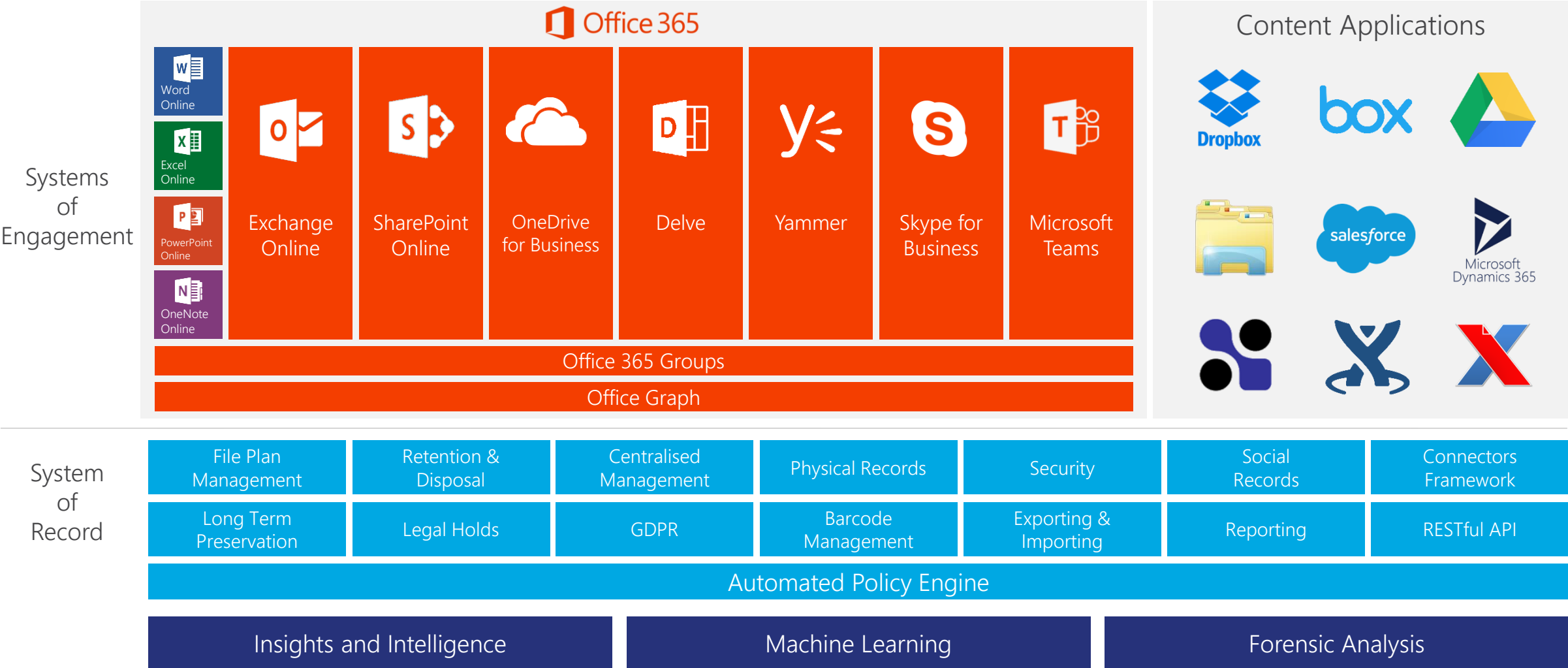
Violator's Signature: [Redacted]

Violator's Address: [Redacted]

Pay this Amount

Citations  
Remittance Processing

# Content Services Platform Based Approach to the Modern Workplace








# Platforms that can now Manage any content source



**Content Repositories**

- High friction information governance
- Content growth can be difficult to manage individually
- Rapidly deploying new workspaces for information creation
- Focus on creation and accessibility, but aren't compliant
- Often driven by line of business, not enterprise



Compliance – Rec Mgt	Management App		Physical App		
	Search				
	Connector and API Framework	Rules Engine	Retention and Classification	Analytics and Intelligence	Pluggable Storage Layer
					
	Security and Auditing				
Microsoft Azure Public or Private Cloud					

**Content Service Options**

- Records Management as a Service
- Unified policy, fully automated
- 1<sup>st</sup> and 3<sup>rd</sup> party connectors via Connector Gallery
- Federated IM achieves global compliance
- Extensible platform

# Compliance and Security

Seek suppliers that offer platforms and services to meet the following standards

<input checked="" type="checkbox"/> ISO 16175	<input checked="" type="checkbox"/> ISO 15489	<input checked="" type="checkbox"/> ANSI
<input checked="" type="checkbox"/> IS40	<input checked="" type="checkbox"/> SOX	<input checked="" type="checkbox"/> VERS
<input checked="" type="checkbox"/> 21 CFR Part 11	<input checked="" type="checkbox"/> HIPAA	<input checked="" type="checkbox"/> NARA
<input checked="" type="checkbox"/> MoReq 2010	<input checked="" type="checkbox"/> FIPS 140-2	

- Platform providers with data centers are certified to the highest industry standards ensuring your data is safe
- Options include global locations to co-locate your records in the same data center as your content services tenant
- All traffic between Records365 is encrypted
- Seek suppliers that have passed a minimum of SOC2 Type 1 and Type 2 Certifications

# Sample Digital Transformation



AI & Mobility DT Use Cases