

# PARTNER WITH DOCUPHASE & START YOUR DIGITAL TRANSFORMATION





# DOCUPHASE

EXPERTS IN  
**ENTERPRISE AUTOMATION**



**DOCUMENT MANAGEMENT**

Every organization has a unique and valuable digital transformation opportunity. The rules of business are changing rapidly and as business leaders it is our job to apply these new rules to gain an advantage for our company. You can rely on DocuPhase to help you build a vision and guide the implementation of digital technologies to drive the next level of engagement, enable growth and maximize your competitiveness and profits.

# HOW WE HELP

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Our goal is to guide you through your Digital Transformation! While companies have similar business processes, we have found that every company is unique. We partner with you and your team to understand your organization. With your company knowledge and our best practices and expertise, together we co-develop a solution that works best for you!

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## IMPROVE CUSTOMER EXPERIENCE

Connecting your customer into the process provides an increased level of engagement that empowers clients with self-service and the knowledge that they are important. Your employees have instant access to critical information and are proactively assigned tasks ensuring a smooth flow of work, decisions, and escalations, ultimately improving all customer interactions.



## GROWTH & SCALE

As growth accelerates, challenges are compounded and the need for effective processes are critical for success. Process automation provides a scalable platform for growth using workflows to manage how information, activities and resources flow through the organization according to your specific business rules getting work done as efficiently as possible. Staying focused on productivity, efficiency and maximizing resources, Enterprise Automation is your foundation for growth and continual process improvement.



## COMPLIANCE, CONTROL & VISIBILITY

Enterprise Automation ensures your business operations stays within the bounds of your defined standard operating procedures and the demands of regulatory compliance. You will greatly reduce the demands and expense of compliance and have greater oversight into how work is getting done, who is doing it and a complete audit trail to help manage resources. With added visibility, improved controls and enforced processes, compliance requirements are met mitigating the expenses associated with risk.

# HOW WE **HELP**

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## **INCREASE EFFICIENCY**

Automation drives efficiency and allows you to get more done with fewer resources while reducing turnaround times. It further allows you to provide a more complete level of service by eliminating the mundane tasks that typically do not provide value to the client or organization. Eliminating data entry, email tasks, routing, filing, searching for information and even improving access to information trapped in your current systems frees your team to focus on higher value activities.



## **REDUCE COSTS**

Your most expensive resource is your people, and the most expensive way to grow a company is by increasing staff. Automation gives you a tool to eliminate your dependence on staff to get work done! It provides a platform for growth without having to add additional overhead. Once a platform for automation is in place, exponential growth is possible with minimal expense.



## **SIMPLIFY YOUR WORKPLACE**

Provide your team with a single platform for accessing critical information, completing tasks and managing workloads, while seamlessly integrating with and enhancing the functionality of other business applications. Deliver value across all business units and departments, by improving communications, connectivity and reducing the complexity of current operations.



## **COLLABORATION**

Connect your people, processes, and systems to improve the flow of information and improve communications between team members, departments, business units, customers, vendors and prospects to reach new levels of engagement and positive experience.

# HOW WE HELP



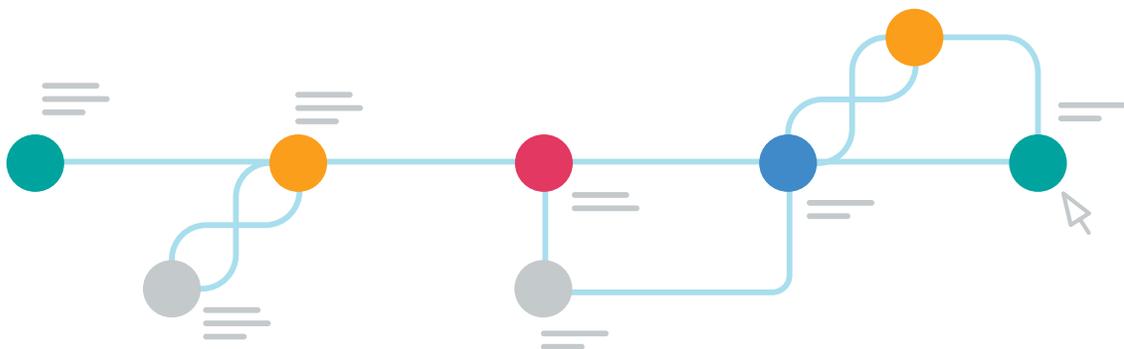
## IMPROVE DECISION MAKING

Track notes, progress, history and more information so decisions are better informed and made more quickly. Improve management oversight, auditing and review to reach new levels of quality through greater collaboration. With real-time business analytics, you will be empowered to make data-driven decisions that improve the value to your organization.



## CONTINUAL IMPROVEMENT

Once implemented, an automated solution is never static. Your business is always facing increasing demands and new business requirements, thus your automation platform needs to accommodate change and welcome enhancement. DocuPhase provides the foundation, cores and tools that allow you to easily improve, change, enhance and expand to meet your ever changing operational environment. It is essential to give your team the ability to continually improve your organization's business processes, workflows and information management to drive success today and into the future.



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# OUR APPROACH

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DocuPhase partners with you to first understand the possibilities and opportunities Digital Transformation can bring to your organization to build a clear Digital Transformation vision. We work together to understand what your organization looks like today to identify areas of focus that will provide the greatest value, benefits and returns. Once we understand the challenges that you are facing, together we determine the end goals and desired outcomes. We then co-develop a solution specific to your needs and garner buy-in across your organization through functional proof-of-concepts to provide excitement and trust. Using best practices and industry expertise, we will guide your organization through your Digital Transformation.

DocuPhase engages your team at every level of the organization to discover how work is being done and how to eliminate the mundane tasks to improve and optimize your business processes. The future state of your business is driven by your vision and goals while being supported by our methods and platform. Our engagement is much more than implementing software; we want to truly revolutionize the way your team gets work done! With DocuPhase, your business will have a foundation for growth, new levels of productivity and continuous process improvement. Our team has the experience to deliver unmatched outcomes and results.

## HOW WE PARTNER WITH YOU





**The amount of dollar cost savings is immeasurable. We went from a covered wagon of searching through hoards of file system folders... to a futuristic rocket ship that is totally self-contained, works with our existing systems... and can be customized by us anytime we need to change the requirements.**

**SHERRY KENT**

Alaska Village Electric Cooperative

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# THE TOOLS WE USE

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DocuPhase is your Enterprise Automation partner! Based on your company's goals and desired outcomes, the DocuPhase team delivers a rapidly deployed solution that will make your office a more efficient workplace with automated processes, enhanced visibility, enforced compliance, accountability and a greater capacity for growth.

## THE **DOCUPHASE** ENTERPRISE AUTOMATION PLATFORM

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The DocuPhase Enterprise Automation Platform provides the fundamental core capabilities to enable a complete digital transformation. Seamlessly integrated, these cores provide the basic building blocks for rapidly developing and deploying applications and solutions to meet your greatest challenges and needs.

Once you understand the power of the combined cores, you will know a new level of possibilities to enhance your business.



Workflow Automation



Robotic Process Automation



Document Management



Web Forms



Data Capture & OCR



Systems Integration



Custom Analytics



Custom Portals

### **WORKFLOW AUTOMATION**

Rapidly design, deploy and manage simple or complex workflows to proactively drive your business processes. Enhance visibility, compliance and adherence to business rules and policies. With automation you will dramatically reduce turnaround times to enhance customer service and simplify your workplace without having to add resources!

### **ROBOTIC PROCESS AUTOMATION**

Automate the interactions between systems, applications, websites and portals so your team doesn't have to! With RPA,

information can be acquired, modified, analyzed and delivered automatically, freeing your team to do more.

### **DOCUMENT & CONTENT MANAGEMENT**

Go paperless and give your team the power to find the information they need when they need it. Eliminate lost or misplaced documents ensuring compliance while providing easy access, accountability and audit trails. Increase efficiency and customer services by providing first-call-resolution.

# THE TOOLS WE USE

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## WEB FORMS

Turn any informal paper, spreadsheet or email process into a powerful Web Form based workflow. Give prospects, customers, clients, employees and vendors an easy way to start any process by simply filling out a web form. Then move the form and any additional attachments through your business process automatically with assignments, tracking, notifications and escalations for greater productivity.

## DATA CAPTURE & OCR

Rapidly capture documents from any source via scanners, multi-function devices, email or mobile devices to organize and manage all of your unstructured information. Automate filing and data entry using character recognition technology to OCR the data you need to process documents and get the data into your key applications. Invoices, PO's, Receivers, Claims, EOB's or other common business transaction documents are processed with little human intervention for fast and easy data capture to power your business.

## SYSTEMS INTEGRATION

Integrate key applications and systems to eliminate duplicate data entry and improve the flow of information through your organization. Seamlessly integrate the DocuPhase platform into your applications so users have more power and access to critical information with a single click. Give your team the power of having only ONE

system of record to work from eliminating the burden of working with multiple systems.

## CUSTOM ANALYTICS

Use the power of real time dashboard analytics and reporting to monitor the health of your business and the processes that drive performance. Quickly see issues and manage resources to gain optimal performance from your team. Leverage metrics to manage workloads and optimize your organization's productivity.

## CUSTOM PORTALS

Enhance engagement with your organization by providing powerful self-service, self-monitoring and web form based processes through a web portal. Improve service levels and simplify communication with customers and vendors by giving them direct access to get things done, monitor the status of progress and to provide updates or additional documents and information. Reduce the burden of communication, automating correspondence to reduce labor and improve turnaround times.

Are you ready for automation? Schedule a meeting with one of our automation experts to see if an **Enterprise Automation Platform** is right for you!

[SCHEDULE A MEETING](#)

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# Specialized Solutions to Common Problems

DocuPhase offers focused solutions with the experience needed to implement successful deployments. Our best practices maximize the value of the DocuPhase Platform for your organization minimizing expense and reducing implementation time.

AP AUTOMATION

HR AUTOMATION

SALES ORDER AUTOMATION

DOCUMENT MANAGEMENT

PURCHASING AUTOMATION

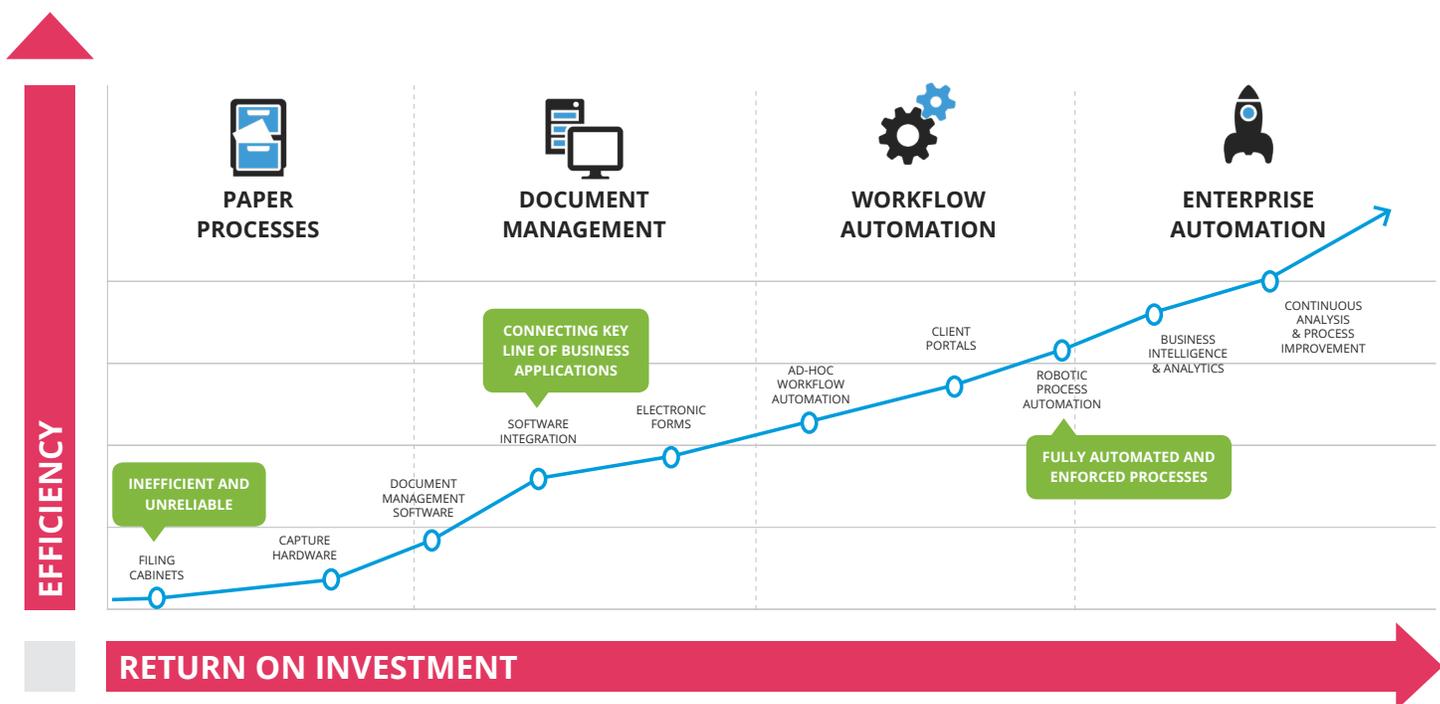
PAYMENT AUTOMATION

If you ever want to expand to other departments, the DocuPhase team is there to help!

## The Effect of Enterprise Automation

“An organization’s ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage.”

Jack Welch  
Former CEO, GE



# ENTERPRISE AUTOMATION

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The DocuPhase Platform is easily expanded across all departments to provide greater value in your investment. The DocuPhase team is here to help you maximize your investment and show you the advantages of a connected organization.

Our goal is to partner with our clients to deliver innovative solutions that automate and simplify your workplace with unmatched outcomes and customer support! We strive to accomplish this with zero downtime, minimal disruption and rapid employee adoption.

**Paperless:** instant access to information when you need it, every time

**Data entry:** eliminate data errors and reduce time spent on data entry

**Gain control:** enforce business rules and compliance

**Visibility:** gain insight into your business processes and optimize how you work

**Decision making:** real-time analytics empower you to make data driven decisions

**Growth & scale:** set a foundation for growth by reducing overhead & do more with less

**Reduce costs:** eliminate tasks you shouldn't be doing and focus on higher value work



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# CASE STUDY: ALIMERA SCIENCES

Alimera Sciences is a pharmaceutical company that specializes in the research, development, and commercialization of prescription ophthalmic pharmaceuticals, focusing on diseases affecting the back of the eye or retina. With an international team and lengthy manual processes, Alimera knew they needed to implement an automated Accounts Payable solution. DocuPhase's Accounting Automation toolset enabled Alimera to reduce their invoice processing time by 93% while providing more visibility into the Procure-to-Pay process.

## THE CHALLENGES

The challenges Alimera faced prior to implementing DocuPhase are common challenges in Accounting departments.

#1: At the time, Alimera's current accounting platform had limited licenses, which limited productivity. Before implementing DocuPhase, for example, anyone who wanted to create a Purchase Order had to have a license to login to the platform, delaying the process before it even began.

DocuPhase integrates with Microsoft Dynamics to make generating POs a breeze. Users can simply sign in to DocuPhase via their web browser and complete a form based on the data that already lives inside of Dynamics. Vendor Names and Codes automatically populate in DocuPhase's Web Forms, so all users have to do is list which items are being purchased and electronically submit the form to the correct contact for approval.

#2: In Alimera's former workflow for processing invoices, they found that an invoice would come in, go to the Accounts Payable department, be distributed to the various parties that needed to approve those items, and sit on that person's desk for two or three months. Alimera wanted to stop pushing paper and gain a better system of tracking those documents as they came into the business.



Alimera Sciences was able to reduce invoice processing time by 93% with DocuPhase's Accounting Automation solution.

"Our AP Clerk has found that the program itself has been somewhat of a God-send in the fact that it's lessened her workload tremendously."

**Phil Jones**  
Executive Director of Finance  
Alimera Sciences



With DocuPhase's Process Automation Designer, advanced capture tools automatically extract line item details from the invoice, removing the low-value, time-consuming task of manual data entry. Once the information is in the system, the assigned user is presented a task, which includes step-by-step instructions of each step to be completed. All related documents—the invoice, purchase order, and receiving report—are presented to the approver in a Binder, so all the approver has to do is click "Approve" to route it to the next step in the process. This dramatically reduces the time needed to process an invoice and provides visibility into where a document lies in the business process.

# CASE STUDY: ALIMERA SCIENCES (continued)

## THE DECIDING FACTOR

Prior to DocuPhase, Alimera was using a software that didn't provide the full visibility and Procure-to-Pay system that they were looking for. After looking at many different software solutions, Alimera chose DocuPhase based on its flexible, yet customized offerings.

"We selected DocuPhase based on the follow-up that was done after the initial presentation," said Phil Jones, Executive Director of Finance at Alimera. "When we had questions and got into the more serious details, DocuPhase was willing to look at our business processes and work with us as a partner."

DocuPhase went live after a couple of months of testing and system clean up. From that point, it only took about two weeks to fully implement the system. "[Implementation] was a lot quicker than I thought it would be," said Jones. "Everyone embraced it immediately, and it's now such a standard part of our everyday business. I think everyone probably wonders why we didn't have this before."

## THE RESULTS

DocuPhase's Process Automation system allowed Alimera to expedite all business processes, yielding a significant increase in productivity and customer satisfaction. With their new automated workflow system, tasks are now tracked to provide visibility into where assemblies are in the process; users can track requisitions for parts from the generation process through quoting and receipt, allowing Alimera to tie purchased parts back to original quoted prices; and the Accounts Payable department can process multiple types of invoices in order to match them against the original purchase.

The amount of time saved was the most surprising benefit of implementing DocuPhase, said Jones. To process an invoice before using DocuPhase, it could take a week to a couple of months. This was especially true for invoices that needed to be approved by multiple sectors of the business. Now, most items are done within 24 hours.

Further, prior to DocuPhase, Alimera's Accounting department had two Accounts Payable Clerks. When one employee left the company, Alimera decided to hold off on hiring someone new.

What they've found is that their current Accounts Payable Clerk has gained half a day of time to complete more tasks, allowing Alimera to offload a lot of work to her that she was not able to do prior to DocuPhase. So, she's not only saving time; she's gaining time. Certainly, these time savings didn't affect only the Accounting department. They affected the business as a whole. "

The other departments who use [DocuPhase] don't have to worry about keeping track of a piece of paper and having to take it back to someone," said Jones.

With DocuPhase's Accounting Automation system, Alimera now has the time to focus on strategic planning, and vendors are receiving payments on time.



**TALK TO AN EXPERT TO LEARN  
HOW AUTOMATION CAN HELP  
YOUR ORGANIZATION**

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# INDUSTRIES WE SERVE

Healthcare/Medical

Banking/Finance

Insurance

Manufacturing

PEO/HRO/BPO/Staffing

State and Local Government

Engineering

Information Technology

Hospitality

Legal

Law Enforcement/Prison Management

Education

Property Management

Construction

Non-Profit/NGO

Oil and Gas

Transportation/Railroad

Utilities

And more...

## DEPARTMENTAL OPERATIONS - HOW OTHERS USE AUTOMATION

Approval Processes

AR/AP/Billing

Purchase Request/PO Generation

Invoice Approval Processing

Case Management and Escalation

Credit and Collections

Expense Report Processing

Travel Request and Approvals

Auditing/Compliance

Automated Data Collection, Extraction, and Entry

Website Interaction Robots – Gather or Enter Data

Recruiting and Selection

Employee File Management

HR Onboarding/Application Processing

Certification Validation/Enforcement/Renewal

Performance Review

Title and Loan Processing

Enrollment

Application Review

Underwriting

Funding

Claims Processing

On-Site Inspection/Data Collection

New Patient Enrollment

Patient Record Management

Medicaid/Medicare Billing and Resubmission

Contracts Management

Knowledge Base Management

Training/Licensing/Certification Renewal

Processing

Status and Information Change Processing

License/Certification Renewal Processing

Custom Design/Engineering Review

Customer Service

Order Processing and Fulfillment

Support Case Escalations

Client/Vendor Self-Service

Customer Success Dashboards

Project Management

Portals

# Leverage the Power of ENTERPRISE AUTOMATION



**Automate tedious work and administrative tasks**



**Proactively manage user tasks and exceptions**



**Remove the clutter from everyday work**



**Help you focus on real priorities**



**Free your workforce to focus on customers  
& higher value activities**

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