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Intelligent Automation:
Your Guide to a Total Solution

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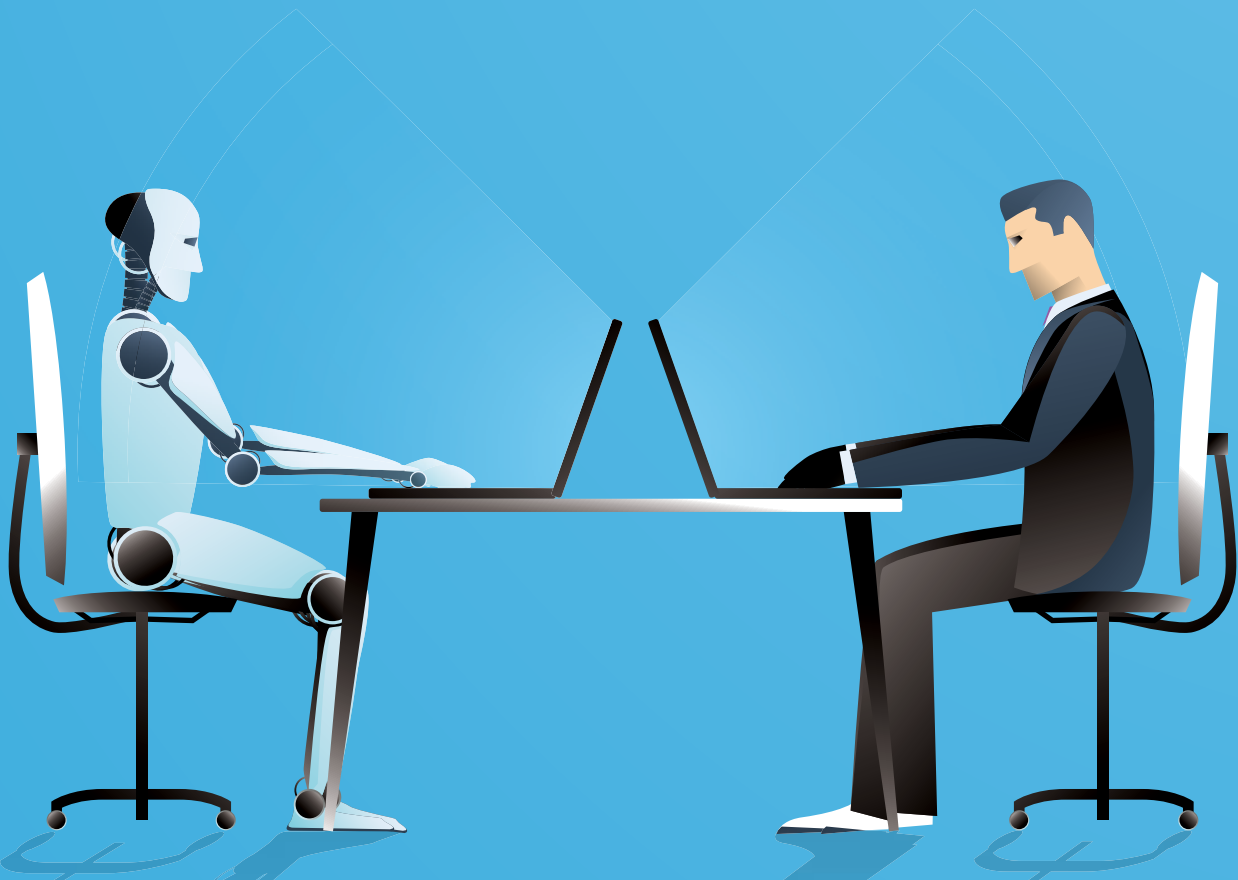
What is Intelligent Automation?

Automation is a critical part of any successful company's tech stack, as it not only simplifies mundane tasks, but it also frees up time for human employees to focus on more strategic programs. While several forms of automation exist, the most productive form is known as Intelligent Automation (IA).

Combining related new technologies like Robotic Process Automation (RPA), Advanced Workflow, Document Generation, Process Intelligence, Machine Learning Intelligence, and Mobile Intelligence, IA is the application of simple automation technology to more intelligent or "smart" forms of automation such as artificial intelligence (AI).

Below we'll explore this in more detail to discover how IA can transform your business into a thriving, digital workforce.

So how does Intelligent Automation work?

Intelligent Automation uses advanced automation capabilities to make an organization more agile. When configured and executed correctly, an intelligent automation solution enhances your organization's workforce with digital workers sometimes known as "bots." With IA in place, employees can focus on more valuable and strategic work by establishing a "digital workforce" to handle the repetitive or more manual processes.

IA in Real Life

To put this into a real-life scenario, imagine a refrigerated truck that must sustain a cold environment to adequately deliver foods or medical samples to a health facility. If the refrigeration components were to break and the truck's temperature rises, the food or samples could spoil, affecting the business as well as the customers. Attaching a sensor to the refrigerator to determine when or if the cooling units are close to breaking is artificial intelligence. Rather than having an employee stop along their journey and determine if the truck is still in good working order, a sensor can monitor and measure the output in place of the human worker.

But monitoring the cooling unit is only minimally helpful if there isn't a system in place to issue an alert before the truck breaks. Taking it a step further, attaching

RPA to the sensor could add a workflow capability, simultaneously sending a message to the worker and scheduling a maintenance technician to make repairs before a loss occurs. This blend of devices and humans communicating proactively showcases how IA turns simple, or "dumb" technology, into a smart process that saves businesses money and time.

Other examples of IA include data entry or data transfer, alerts, compliance, setting up or responding to claims or quickly pushing digital paperwork through an existing system or set process. This high-volume and tedious work can be executed quickly and deployed with virtually no errors. Ultimately, IA's integrations with other advanced technologies allow you to re-imagine your business processes.

Benefits of IA

Most employees aren't excited at the idea of manual, repetitive work such as data entry; however, these tasks can be imperative to daily operations. With IA in place, the employee who manually keyed data into various systems can now focus on more strategic work or even move to a new position, augmenting an organization's overall impact.

Further, if a business seeks to trim expenses, many aspects of an intelligent automation solution can be deployed relatively quickly and at low cost. When implemented correctly, and with a long-term strategy in mind, IA will quickly pay for itself.

As a result, organizations can invest additional resources into initiatives like better customer service, in turn leading to increased profitability through improved productivity. Other benefits include optimized back office-operations, cost and risk reduction, and effective monitoring and fraud detection.

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Don't Be Late to the Game

Digital transformation in the workplace is a virtual arms race between competitors to see who can install and transition to the best automated solutions. The winner has a clear head start on reaching customers more quickly and addressing their needs with accuracy and efficiency. Those who delay this transition and adoption of automation in their work processes stand to lose out on the potential for new customers, retaining current ones, and ultimately, new revenue.

How to Get Ahead

The desire for progression around automation can be found everywhere, from the simplest businesses all the way to the Oval Office, where the former President called for more RPA in his 2020 budget.

With technology at your fingertips and partners who are ready to help today, organizations have the following choices:

» **Do Nothing:** Sit and wait to see whether IA and automation technology are simply just hype. But if you wait for the hype to die down to understand what you really need, your competition has an open door, leaving you in their wake.

» **Drive Change:** Walk through the open door to bypass your competition. Businesses who make concerted efforts to understand and invest in the new age of technology will be the ones left standing.

Organizations who automate their business processes using automation tools that focus on case management, workflow, robotic process automation, artificial intelligence and optical character recognition (OCR) will operate with more agility by allowing valued employees to focus on more meaningful work.
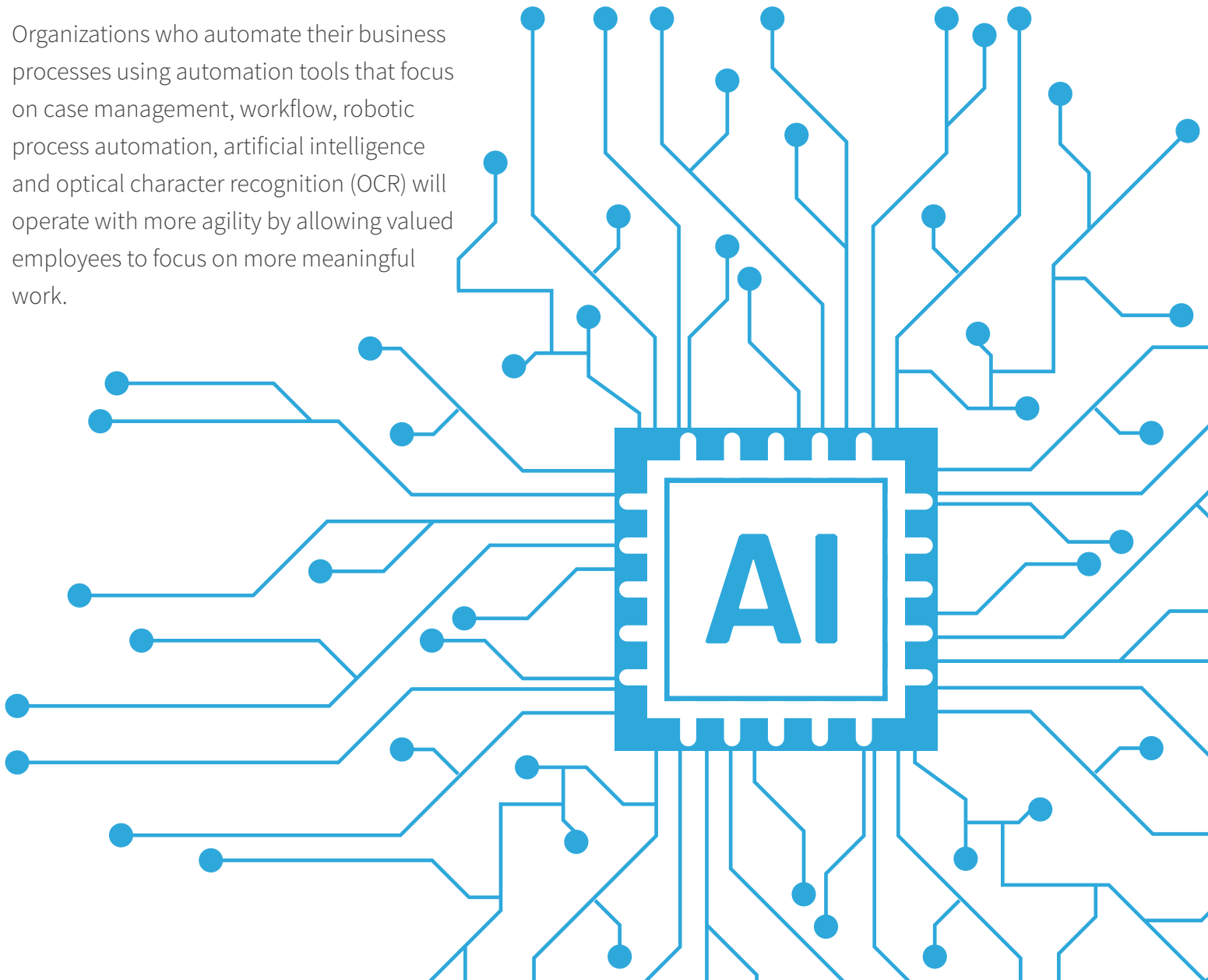
Implementation and Strategy

The power of a total automation solution relies on a well thought-out, comprehensive strategy. In the digital transformation arms race, you should consider the following:

» Are you partnering with experienced experts who understand the technology?

» Does your digital transformation plan include automation?

» Are the different pieces of technology in which you're investing integrated?

» Where do your competitors currently outshine you and how can you crush them with automation?

As you consider the steps toward a digital transformation and the technology necessary to implement, it is important to find the right partner who can help aid in technological growth and help you move quickly.

Companies who act both wisely and quickly to invest in intelligent technology will positively impact the course of their success. Don't get left behind in the race against your competition.

What do you need in your total automation solution?

To get started, you'll need the proper automation tools from a reputable provider. Having the right strategy and partners in place will benefit you as you carve out the right tools to complete your automation solution.

KeyMark can help you connect these automation tools and software to IA processes and build a custom solution tailored to your individual business's needs. Keep reading for the tools needed in a typical solution.

Case Management

Case management applications can range from payment management to contract bids, claims handling and loan origination to traditional healthcare, crime, or legal cases. Case management depends heavily on people to play a critical role in the often unpredictable, unstructured work that requires human discretion, whether it's providing customer service or managing an incident report, a service request or a suspicious transaction.

Case management automation consists of tools that allow you to analyze related content, manage supporting documents and track notes and case history. Further, it's more than automating your organization's manual tasks. It's about equipping your personnel with all of the information they need to make more informed decisions and provide better service to your customers or constituents.

Data Capture Capabilities

For many organizations, the greatest opportunity for improved productivity starts with automated data capture. It allows you to capture and access information more quickly, resulting in automated manual tasks and accelerated business processes.

One example is CloudCapture Plus, a cloud-based Optical Capture Resolution (OCR) solution that automates high-volume document processing, classification, and data extraction, so your team can focus on more important things like advancing your organization.

By leveraging today's most advanced content capture technologies, you can classify incoming documents, extract the most critical information, verify data as needed and deliver it to the relevant individuals at your

organization. As a result, you're able to minimize manual data entry, maximize the amount of documents you process on a daily basis and begin routing the information through your workflow – all at the point of ingestion.

Optical Capture Resolution (OCR) and Robotic Process Automation (RPA)

Once you have an OCR tool, you'll also need a digital worker to help you interpret the data your OCR reads. For example: if an employee receives a PDF file in an email, OCR can pull all of the text and data from that file; eliminating the need for a human to read and manually record the data. Having OCR in place to record the data is great, but where does all of the data go once it's captured, and how does it get there?

The answer is simple, RPA. When Robotic Process Automation combines with OCR tools to create intelligent digital workers, the burdensome task of manual data entry can be completely automated. This allows employees to spend more time on more important work, effectively eliminating data errors.

RPA allows you to acquire, enhance and deliver information from virtually any application or data source – including websites, portals, desktop applications and enterprise systems – without the need for web services, API's, or custom coding.

Even more, RPA bridges the gap between your systems of engagement and your systems of record, so your team can focus on the tasks that matter most. Areas that most benefit from RPA include finance, health sciences, insurance, human resources, IT, transportation, and more! With the help of computer-coded software digital workers, you can:

» Gather, collate and validate information automatically
» Synthesize and analyze structured and unstructured data
» Monitor, detect or report operational performance
» Learn, anticipate and forecast behavior or outcomes

> RPA bridges the gap between your systems of engagement and your systems of record, so your team can focus on the tasks that matter most.

Using RPA and OCR as complementary solutions unlocks even more potential from both platforms than they have on their own. By implementing these solutions into business processes, a company can streamline manual tasks and free up its workforce for value-added work, all while eliminating errors and inefficiencies in its most important data.

How to Choose the Right Reseller

Tools like the ones stated previously can be assembled to create a full solution that brings the very best of intelligent automation to your workforce. When trying to find the right reseller, there are a few important things to consider:

Choose a Reseller with Expertise

Choose a reseller partner who can represent multiple technologies and recommend quality vendors for your digital transformation. You can't be expected to keep up with every technology trend, so finding an external expert who specializes in intelligent automation technology every day will simplify the implementation process. Once you feel good about a potential partner, here are some questions to ask:

- » How long have they worked with the technology?
- » Do they work with industry leading partners?
- » Are they certified on their various software platforms?
- » Can the technology give you airtight security?
- » Does the technology immediately increase your productivity?
- » Do they have an implementation team?
- » Do they have a team who can support you after the sale?

Choose a Reseller with a National Presence

No matter where you're located, a top reseller should be able to work with you to deliver technology solutions that meet your needs. Not only does it make it easier on your organization, but a national reseller will have the resources and capabilities to take care of you every step of the way. Other benefits can include:

- » Support hours not limited by time zones
- » Managed services available in your region
- » Reseller experience with companies of varying sizes, industries and areas
- » Choose a reseller with the best technology

There are many intelligent automation solutions on the market, but only a select few are considered the best. How do you know which solutions have this distinction? The Gartner Magic Quadrant serves as a trusted, unbiased source for market research reports on information technology. Check out the latest rankings and see for yourself which companies sit at the top.

As a systems integrator, KeyMark specifically partners with industry leaders who specialize in custom automation solutions. Working with a reseller who has relationships with cutting-edge vendors allows you to build out a solution with state-of-the-art software solutions.

Choose a Reseller with a Partner's Mindset
When searching for a reseller of intelligent automation solutions, you should look beyond simply finding someone who sells out-of-the-box software. To get the most value out of your solution, look for a reseller who will be your partner; a company that works alongside you to understand your business, creates a custom solution for your specific needs, and extends support during the entire process to ensure you receive the best possible value from your technology solution.

Your reseller should provide the best intelligent automation solutions on the market, a dedicated team to support you, and all of the resources you need for success. Don't settle for anything less! To learn more about KeyMark's advice around choosing a reseller, check out our ebook: How to Choose an Intelligent Automation Reseller.

Intelligent automation ultimately changes the way you do business and, if implemented correctly and ahead of your competition, catapults your business into the winners' circle. Contact KeyMark today to learn more about the software behind these intelligent automation tools and how we can customize a solution for you to create a digital workforce that maximizes efficiency, minimizes risk, and simplifies mundane tasks.

About KeyMark

KeyMark is a leading provider of intelligent automation solutions focused on enabling better business outcomes through capture (OCR), workflow (ECM), case management (DCM) and robotic process automation (RPA) solutions, artificial intelligence, and machine learning technology. KeyMark helps clients leverage technology, such as artificial intelligence and machine learning, to maximize productivity and decrease manual labor in industries such as: financial services, healthcare, insurance, manufacturing, distribution, utilities, logistics and the public sector.

Together, KeyMark, Blue Prism, UiPath, OnBase by Hyland and Kofax help organizations to scale effectively and achieve operational agility by deploying a digital workforce that maximizes productivity and minimizes manual work. As a value-added reseller of today's leading intelligent automation solutions, KeyMark is one of a select few organizations worldwide to represent such a comprehensive list of automation capabilities with years of proven experience and award-winning Extended Support. Additionally, KeyMark is the creator of Forms InMotion, an innovative software-as-a-service solution for forms automation.
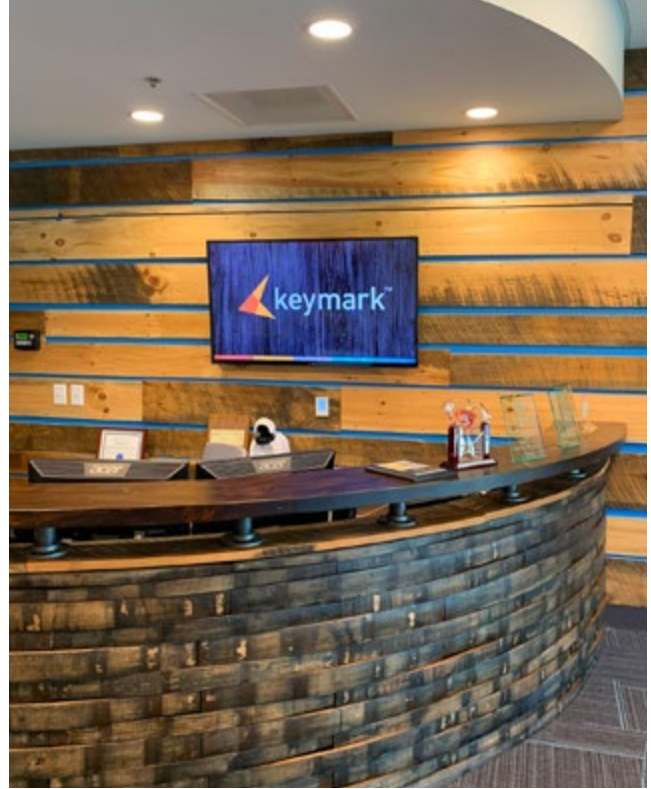
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