



Workflow Planning

Understanding and Creating the Digital Workplace

Tools to implement a positive digital workplace transformation

DIGITAL SOLUTIONS • PROFESSIONAL SERVICES • INFORMATION TECHNOLOGY

RICOH
imagine. change.

The Opportunity to *Optimize*

During the pandemic, going digital became a matter of survival, forcing many businesses into a rushed transition. Soon it became clear that many practices that once worked no longer do. Some, like paper-based processes, were already in decline. Amidst office closures their limitations, inefficiencies and risks became all too apparent.

In the new environment of remote teams and hybrid working, digital documents and workflows are no longer optional. But unlike the abrupt shift of 2020, businesses can now be much more strategic about implementing digital workplace solutions.

The key to creating a seamless and effective digital workplace is workflow planning.

Think about your business processes. How many routine functions and tasks still require employees to be physically present? How many are still done manually? Managing email. Searching for documents. Pestering colleagues for input. Attending open-ended meetings. Time-wasters like these are a problem, and often they go unaddressed because people get stuck, develop tunnel vision, or aren't aware of newer, more efficient options.



// The COVID-19 pandemic ushered in the opportunity to rethink how we work. It's a sea change that occurs less than once in a generation. //

— MCKINSEY & COMPANY

Where Does Your Employees' *Time Go?*

Employees spend only 40 per cent of their time doing actual strategic work¹. Instead, they often lose valuable time — and workplace productivity — on lower-value activities that are not always directly tied to advancing personal or company growth.

41%

reading and answering emails

36%

joining unexpected meetings

34%

chasing for input or approvals

It doesn't have to be this way.
Especially in today's new era of hybrid work.

¹ <https://resources.asana.com/rs/784-XZD-582/images/Anatomy-of-Work-Index.pdf>



Overcoming *Resistance*

Despite these ongoing issues, and the proven digital workplace solutions now available, many business still hesitate to take charge of their workflow. A common sticking point is that they are too busy to automate². This belief forces them to constantly weigh the short-term need to get their core work done against the longer-term benefits of workflow planning and automation.

But the tide is turning, indicating an inevitable shift. According to 2021 data:

- 31% of businesses have fully automated at least one function³
- 66% are piloting solutions to automate at least one business process⁴

For mid-sized and small businesses, there is pressure to adapt, compounding the stress of deciding what to do. The challenge for many is where to start.

² www.forbes.com/sites/forbestechcouncil/2021/02/17/why-businesses-should-never-be-too-busy-to-automate

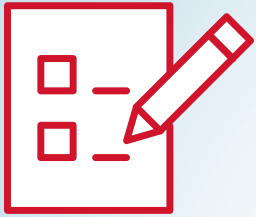
^{3, 4} www.netsuite.com/portal/resource/articles/business-strategy/business-automation-statistics.shtml

A man with short dark hair and glasses, wearing a blue button-down shirt, is looking down at a tablet computer he is holding. He is in a meeting room with other people blurred in the background. The lighting is soft and professional.

Understanding

Workflow Automation

Workflow automation is a core aspect of the digital workplace, and gives you the right tools for remote teams. But what does it mean for your business?



1

Saying goodbye to manual data entry.



2

No more waiting on others to give you information.



3

No more damaged or misplaced files while working remotely.



4

Stability:
Integrated and secured processes continue despite disruption.



5

It means staying competitive.

Workflow automation means streamlining your processes and the flow of your information, so you can capture and transform it into powerful decision making. Taking manual tasks off your plate gives you more time to focus on the strategic elements and functions of the business, improving ROI and boosting revenue.

What to expect from workflow automation:

1. Data automatically imported, digitized and routed
2. Transparent flow of information and faster approvals
3. Searchable, connected access to information from anywhere
4. Integrated, secured and agile business processes
5. More consistently positive customer experiences

Dialing It Down

When discovering how you can benefit from workflow automation, there is one common mistake many businesses make: They believe they need to change their processes, particularly on the back end.

Businesses have a tendency to charge ahead with big technology investments and process overhauls — swapping out ERPs and accounting software.

Upgrading tech and storage hardware. Reassigning responsibilities. This can lead to poor adoption rates and unnecessary costs.

The solution you put in place should not add extra steps to your processes, but this often happens when trying to force-fit technology.



Getting It Right from the Start with *Workflow Planning*

You probably already have many digital workplace components in place. But if they're not working together seamlessly, you may not be realizing all of the benefits they can provide. If your digital processes were added as needed, rather than as part of a cohesive workflow planning, you could still benefit from starting with step one.



First lesson: If it isn't broken, don't fix it.

Keeping your existing technology and processes largely in place, it is best to focus on the front end or beginning of your workflow processes. Creating a digitally fueled workflow from this starting point can give you:

- The ability to leverage your information throughout the entire process with no need for manual intervention.
- Better visibility and alerts to potential problems and outstanding activity ahead of time — flipping management from reactive to proactive.
- A documented, formal structure and procedure that keeps processes efficient, accurate and timely.
- Easier compliance with security and governance rules and regulations.



A Digitally Fueled *Workflow*

Think about your business for a moment. The people. The documents. The decision-making. Do you see the common thread? It's information — and harnessing the flow of information enables you to tap into the power of information.

All things documents turn into all things data, which turns into ALL things for your business.

The success of your business rests not only on the value of your information, but also in its format! Let's break it down:

- Paper documents contain valuable and actionable information for your business.
- Automated workflows drive that information through your processes, improving business efficiency and performance along the way.
- Digitizing documents before they enter a workflow reduces process steps, manual tasks and print spend, further enhancing workflow ROI.

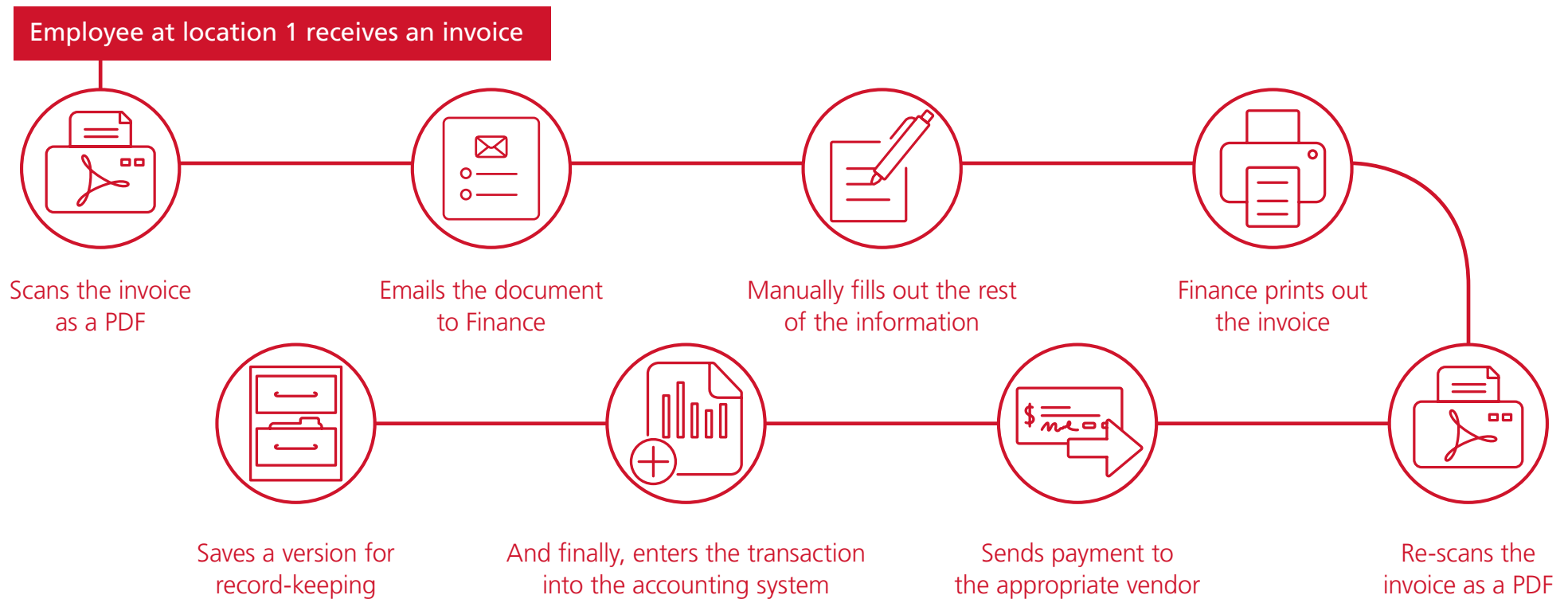
Before Automation:

Look Familiar?

Below is a hypothetical accounts payable (AP) process. Because your office is the financial hub of your (also hypothetical) company, all AP-related invoices, receipts, etc. from other locations are sent to you to manage and process.

Takeaways

- 8 steps
- Printing and rescanning required
- Manual entry to systems



The Optimized Workflow

Here's what the same workflow looks like when the front end is optimized with digitization. A positive ripple effect is set in motion — cutting steps, removing manual intervention, and increasing accuracy.

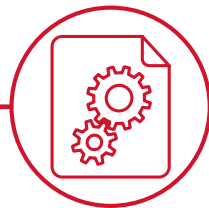
Takeaways

- Only 4 steps!
- Digitizing invoices leads to faster, more efficient processing
- Approval, distribution and system input go from a few days to a few minutes

Employee at location 1 receives an invoice



Scans it directly into the accounts payable workflow system



The invoice is automatically processed, or Finance is alerted if it requires approval



Payment is sent to the appropriate vendor, a record is saved, and the information is automatically reflected in the accounting system



Finance finalizes and approves the invoice digitally

Getting *Started*

Chances are your business can optimize its processes with workflow planning and the right digital workplace solutions. Use this simple checklist to review your business:

- I'm concerned about the security of my information and potential loss of data associated with paper documents (fire, flood, theft, natural disaster, etc.).
- My office is in the habit of printing documents too frequently.
- Data overload is becoming or has long been a problem for our employees.
- Too many hours are spent (re)scanning, printing and filing documents to complete a task.
- Approving and sending documents to the next person requires too much waiting and cause bottlenecks.
- My company or department doesn't have a documented process for tasks.
- We invested in workflow automation, but our employees aren't adopting it fully.
- We invested in workflow automation, but the ROI isn't apparent.

If you are experiencing any of these issues, it might be time to reevaluate your workflow. With the right tools and resources, you can form a strategy and automate your processes to create an agile, integrated experience for customers and employees.



Let us help you **redefine work**

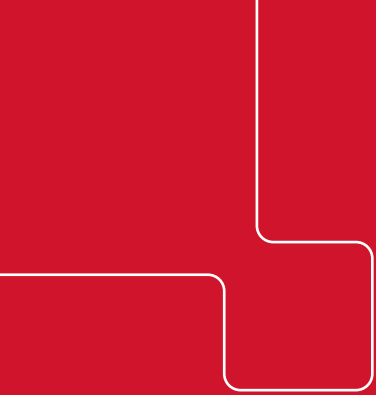
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With 85 years of global experience developing the technology that shapes how people work, Ricoh understands what it takes to support the priorities of Canadian businesses with the right technology that puts people first, empowering them to better serve their customers, support their employees and redefine work and **Change. For better.**

Learn more about how we can help support your dynamic workforce in today's hybrid work.

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