

The Art of CAPTURE

Why Capture Matters

In the early development of Enterprise Content Management (ECM) systems, engineers worked hard to develop compression algorithms, storage capacity, and the ability to view and store varying file types. As these technologies improved, corporations began to realize that once a file was stored that finding it or a particular document in the file was a serious issue. An easy way to think about this is: you are about to sign a \$350,000 deal and you need two documents to make this happen. The documents are in a hard copy file cabinet (i.e. the file) filled with 10,000 pages of documentation stored loose leaf with no recognizable names or organizational structure by which to search. If you can't find these two documents by 3:00 pm, and it's now 2:00 pm, your competitor will get the deal. Three o'clock comes and goes; you lose the deal.

It's at this moment when you, your boss, and the company's senior leaders realize why they should have paid for their information to be findable and not just storable!

Now think about that in terms of an enterprise that has tens of thousands of files stored across dozens of servers. The ability to find, share, and reproduce information contained in them is paramount to their success. This is why when designing and selling ECM systems, we focus on how to capture documents in a way that makes them easy to find.

Capture Front Ends – CFE's

ECM systems are only as good as their capture front end. "Information, whether hard copy or digital can be captured and stored in many ways, without the ability to find it in a timely manner to drive human action and response, it is worthless." A good CFE consists of two components: (1) at least one high quality scanner, with features such as auto duplexing, ledger sized paper, and a robust document feeder, and (2) a software suite with features that include document editing, document clean up, document creation, zonal and full OCR, bar coded workflows, and pagination tools.

Any system can have a great scanner but it is what you do after the document is scanned that counts. For instance capturing information such as customer and transaction numbers, which when added as meta-data (i.e. searchable information added to the header of digital files), allows a system to search for documents based on those numbers. Now when a CSR needs to look up information on a particular customer or sale, the ECM system can create parent and child documents. For instance, let's say a customer calls and has a dispute with an invoice, the CSR can now search by transaction

number, pull up and view every document related to that sale including warehouse, shipping, delivery, and billing information.

Where's the Business Value of Capture?

So what's the benefit to a prospective customer? Decision makers are not interested in features and functions; these are things only operators care about. Relating what a CFE does to business value is key to gaining any decision makers ear. A good CFE can effect and improve key business functions that are important to enterprise decision makers such as:

- Customer Satisfaction
- Customer Retention
- Days Payable Outstanding
- Risk Mitigation
- Compliance
- Security
- e-Discovery

A companies website, annual report, or Internet news sources can reveal what's important to a particular industry or business division. The ability to tie the value of a good capture system to these key business measures is what differentiates value added resellers from the rest of the crowd. It's also what controls gross profit and closure rates.

Relating the Art of Capture to Business Value

The "Art of Capture" is critical when selling ECM systems. Features that may seem unimportant to a reseller, such as the ability to time stamp a document when captured, can have huge implications for companies dealing with government contracts or compliance issues. As any in the military knows many documentation processes are handled by civil servants, which may not have the same dedication or sense of urgency as the military. My son is an airborne combat medic in the Army and he and his wife recently had a baby boy. For his son to be covered by health insurance the company required that all the documentation had to be submitted within six weeks of birth. Although my son submitted everything required on time, the civil servant processing the documentation delayed its delivery and his insurance was denied. His rescue came from the fact that the system had time stamped his paperwork when scanned, which provided the proof needed to reverse the insurance companies decision.

Now take this same principle and apply it to a health care organization that is facing a million dollar fine if it cannot prove that it has filed the appropriate paper work on time to comply with federal or local regulations. How much is the ability to time stamp documents worth to the CEO or COO of that healthcare company? Contrast this with a company who is trying to sell by reducing their price. You could give the CFE away for free but if it can't time stamp paperwork, the healthcare company is just not buying. 

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