



Elevate your business with document process outsourcing!

Businesses are realizing the need to improve their document processes. Pressures to reduce costs, drive efficiency, and focus on core functions are causing them to look for ways to improve their current processes. The “document process outsourcing” term is unknown to many today, but will become prevalent in the future.

Where are the inefficiencies?

Document driven processes exist primarily because of disconnectedness between people, process, and technology. Many systems, especially those utilized in B2B enterprises, don't talk to one another. The financial (ERP) system for a customer in most cases won't allow an electronic transaction from a vendor, and certainly not for all vendors. EDI interfaces exist in some scenarios but those solutions are expensive to build and maintain. Adoption is difficult to achieve as well. Therefore transactions like invoices, orders, shipping & receiving documents, contract documents, and others are used to pass along the data between systems. The unique processes developed by organizations are all disparate. Converting the documents to data and integrating the systems and processes are where the inefficiencies and huge costs lie...and so do the opportunities!

Where to start?

Organizations tend to look at internal processes first as an area for improvement. What they can control is typically the easiest problem to tackle. Internal processes like expense submission, HR enrollment, order, and manufacturing processes have been challenging for most companies. Processes that include external documents and interactions like accounts payable invoices, insurance and healthcare claims, mortgage and banking documents, are more challenging and often more rewarding.

Document imaging - removing the paper!

Many companies utilize imaging technology to digitize the paper, but harnessing the data the documents contain is foundational. Documents must be captured at the outset so the data can be processed and utilized. Advanced capture technology can accurately convert the paper to data which can then be harnessed. Workflow and business rules technology manages process exceptions while bridging the gap between paper processes and systems. In cases where documents are scanned at the process end, little benefit is had except with respect to future access and retrieval.





What are the best practices?

- Define the document lifecycle for a specific process including systems and integration points
- Digitize the document, extract relevant data, & clean up data with human quality control
- Classify the document type to drive further processing
- Integrate systems and processes to automate manual processing
- Leverage approval workflows to initiate, drive, and automate the process
- Append document images and data to back end system for retrieval and audit purposes

Significant benefits realized through document process outsourcing:

- Cost reductions
- Risk reductions (reduction in lost documents, enhanced data quality)
- Efficiency gains (enhanced collaboration, faster process cycle times)
- Strategic advantages (dynamic visibility, outcome optimization, disaster recovery)

Why document process outsourcing?

The primary reason for most companies is cost reduction. The infrastructure investments for this technology is cost-prohibitive for many businesses, ranging from six to seven figures based upon scale and scope. Most organizations aren't experts at understanding document processes or correlating best practices, and are eager to realize all the advantages listed. Further, there is latent desire to focus on core business functions and leave it to the outsourcer to manage non-core functions. DPO providers can offer more specialized, productive, and cost effective personnel resources. Many providers have off-shore staff at a fraction of the cost of rates in the US.

In Conclusion

Document Process Outsourcing is a great alternative for those companies looking to improve business processes, leverage best practices, and reap the benefits that can be realized, while minimizing the investments and risks of taking the task on themselves.

How far can your process improvement journey process take you?

Find out with



CloudX is a Document Process Outsourcing company that offers a wide variety of cloud based (SaaS) document management solutions along with a complete line of services aimed at helping organizations improve process, reduce costs and realize the strategic benefits that can be gained by reducing paper based processes. For more information please visit www.cloudxdpo.com or 860.787.5323.