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# Your Starter Guide to Building a Mobile Workforce with

**JAMES**  
IMAGING SYSTEMS

Expanding your business  
outside of company walls



Developed in partnership with



# About the research:



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### About this eBook

As the non-profit association dedicated to nurturing, growing and supporting the information management community, AIIM is proud to provide this research at no charge to our members. In this way, the entire community can leverage the education, thought leadership and direction provided by our work. We would like these research findings to be as widely distributed as possible.

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### About AIIM

Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant – we've always focused on the intersection of people, processes, and information. We help organizations put information to work. AIIM is a non-profit organization that provides independent research, training, and certification for information professionals.

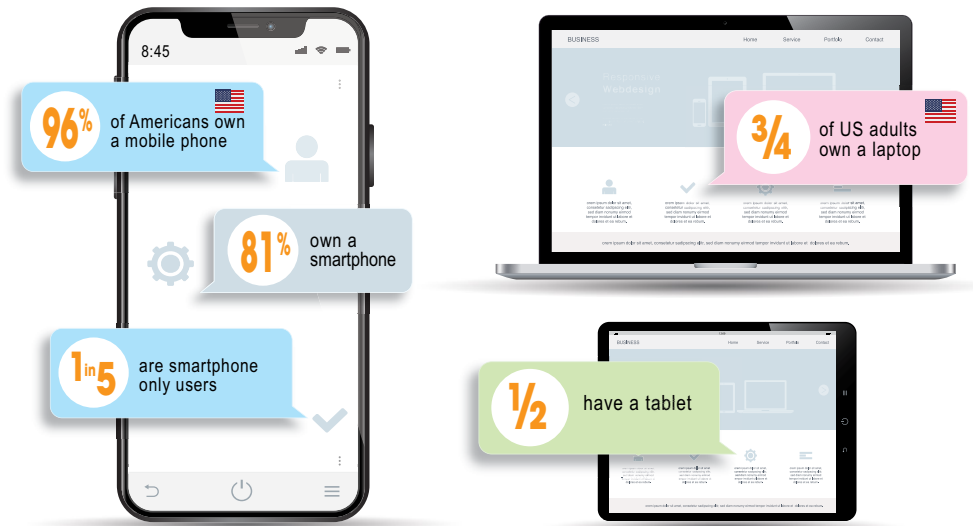
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# Introduction

The age of the Mobile Workforce is upon us: 96% of Americans own a mobile phone and 81% own a smartphone.

But more than that, more and more of us now use our smartphones as our primary means of online access. Roughly one-in-five American adults are smartphone-only internet users. As for the rest, nearly three-quarters of U.S. adults own a laptop, and roughly half own a tablet device.<sup>1</sup> In short, the move to mobile is clear, present, and undeniable.

In contrast to the desktop internet of the early 2000s which was largely stationary, Americans today are increasingly connected to the world of digital information while on the go via mobile devices. This mobile migration is having a direct influence in business today and the disruption is felt in every industry.



# Digital transformation

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### Hitting the Road

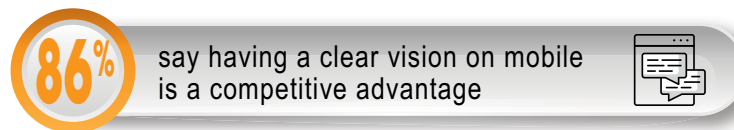
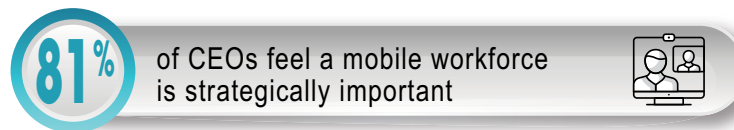
Forward-looking organizations are adopting a connected and mobile workforce that out-performs their in-office counterparts. Those organizations that are tied to tradition risk getting left behind as agility, flexibility, and connectivity become bellwether requirements of digital transformation.

According to a study performed by Forbes<sup>2</sup>, 81% of CEOs see a mobile workforce as being strategically important. Most CEOs (86%) say a having a clear vision of how to leverage mobile technologies can create competitive advantage.

### Benefits of Going Mobile

Recent AIIM research on implementing a digital workforce strategy<sup>3</sup> found that 75% of organizations feel that getting the right information to the right person in context is problem. Increased efficiency and productivity (56%), improved problem solving and collaboration (45%), and better levels of customer service (38%) were named as the top three drivers for a digital workforce. A best practice is a thoughtful focus on identifying and building upon the core capabilities workers need to get their work done.

How are companies benefiting from adopting a mobile workforce? Here are a few ways to consider.



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### More Effective Field Employees

The value of going mobile is especially clear with field employees. For example, there are a number of ways that mobile capture is being used to improve service in the field. Financial institutions are using mobile techniques for new account opening. Insurance organizations enable claim adjusters with mobile capture systems so that they can photograph accident scenes and damage, then capture the accompanying documentation and upload the entire batch on the spot. Government agencies, universities and organizations that work with stacks of documentation find that mobile computing is an open road toward savings and service improvements.

### Streamlined Account and Customer Onboarding

Every company must land and keep new customers, but unfortunately, as other areas of business and commerce have become more and more paperless, the onboarding process for many organizations continues to be challenged by the legacy of paper. But mobile technologies have been developed to ease the process of customer onboarding and get rid

of the paper. Bank loan officers, for example, capture the necessary documents directly – in customer's homes or workplaces – by simply taking a picture with a smartphone. While loan origination is one good example, a similar mobile capture approach provides new value and efficiencies in any process where 'paperwork' must be collected for applications, claims, contracts, etc.

### Improved Customer Experience

The flexibility and portability of a mobile workforce can also lead to improved customer experience, another important success factor today for businesses of all sizes and types. Mobile workers, no matter where they are located, are more readily available to review time-sensitive material, resolve problems and requests, and collaborate with customers, team members, and stakeholders in real time. This potentially gives an organization an edge over its competitors and the ability to generate new revenue streams faster. A mobile workforce can also enhance the perception of an organization by customers and in the marketplace because the business appears more cutting-edge and thriving within its industry.

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### The SMB Advantage

Small and mid-sized businesses are perhaps in the best position to take advantage of trends toward a mobile workforce. A smaller scope and fewer parts and pieces lend an edge over larger enterprises lumbering to react. Indeed, improvements to operational performance are fueling adoption as SMBs recognize that a mobile workforce can quickly level the playing field with their larger competitors. Here are a few advantages to consider:

- **Keep Costs Down** - All businesses, particularly small businesses and start-ups, need to keep expenses to a minimum. But hiring enough staff to cope with growing demand means more workspace, more workstations, more software... all of which costs more money, creating a catch-22 for an expanding business.
- **Boost Client Engagement** - A mobile workforce opens a door to a new level of client engagement. One example is in the banking industry where mobile data capture technology provides a way for loan officers to digitally capture the necessary

documents directly - in customer's homes or workplaces - by simply taking a picture with a smartphone or tablet. Inspectors, drivers, delivery personnel - these are all client-facing activities where a mobile technology enables a workforce approach that works to boost client convenience and engagement.

- **Increase Productivity** - A mobile workforce means that people can use previously 'dead' time, like travel to off-site meetings, more productively. And just because employees are working off-site doesn't mean they're off the radar. Mobile collaboration tools enable people to take part in meetings, share data, and stay connected wherever they are. Productivity is increased because the latest information is at everyone's fingertips, not just those of the employee in the field.

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### Recommendations

To be competitive, SMBs must adopt an operational approach that allows the company to be more agile and responsive, and embrace people and resources outside of their physical location. As a result, a mobile workforce is an important differentiating factor for success. However, achieving a mobile workforce requires new technology and systems to support the environment, putting more pressure on IT and line of business departments to work together and expand capabilities.

The question is: where do you begin? Here are three areas where SMB's can find immediate benefit:

- **Get Rid of Paper** - Despite the ongoing digitization of business today, the truth is that many core business process continue to be burdened by paper. Activities like Customer Onboarding, Accounts Payable, and Human Resources are just a few examples. Getting rid of the paper is the first step to digital transformation that opens a pathway to a mobile workforce and other innovations and improvements.
- **Get a Handle on File Shares** - In the rush to digitize it is easy to let some of the same patterns of behavior and bad habits creep into file shares as they do in managing paper files. A lack of records management protocols make information governance a nightmare as the volume, velocity, and variety of digital files increases; often causing worse problems than before.
- **Embrace the Cloud** - The development of cloud-based mobile apps is a 'god send' to SMBs since they can adopt solutions that enable mobile workers and other advancements toward digital transformation that would not be practical or possible in the past. SMBs don't need to build it themselves; many mobile developers and providers now have tailor-made solutions for core business functions. This can be the quickest, and most reliable way to go mobile.

# DocuWare Mobile

## Workforce - Case Study



**Century Fence** increased employee productivity and profitability by "going mobile" with mobile document management software. The aim was a reduction in the time spent on clerical tasks. Field Superintendents for Century Fence spend much of their time outside of the office, and establishing access to project documents from anywhere and at any time proves to be a boost to productivity since superintendents are not slowed down when they were not in the office. What's more, digital collaboration between departments and motivates every employee to contribute their best work resulting in improved profitability.

A growing company, Century Fence wanted to **reduce dependence on paper-based files, speed up workflows** and **ensure records were searchable and transparent**. The solution needed the flexibility to integrate with their ERP and accounting programs. It also needed to offer easy management of documents such as: quotes, cost breakdowns, bills of material, contracts, insurance certifications, site plans, work orders, change orders, and correspondence between multiple people.

The company chose DocuWare because of its **flexibility, mobile app**, and **ability to sync** with their ERP system. The company rolled out the software at all three locations simultaneously during a staged rollout. Within weeks the necessary documents were automated and Field Superintendents, with tablets, were able to access the information they needed seamlessly and easily. All the company's fencing installations are performed by sub-contractors, so it is crucial for Superintendents to be onsite with quick access to project files at this time. Every member of the team can easily add and access project documents, whether they are in the office or onsite.

A Superintendent's time spent on cost approvals has been reduced from 4 hours to 30 minutes per week. Digitizing accounting process has allowed the accounting department to operate more efficiently, eliminating the hassle, costs and time of physically sending documents back and forth between three offices.



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### Moving forward

Mobile is the new standard. An agile and flexible approach to a new breed of workforce that embraces the anytime, anywhere, any-device model of productivity. Your team's best work can happen outside the walls and limitations of a traditional office and a mobile workforce

is an important differentiator for small and mid-sized businesses today. Look for providers and partners with the right mix of expertise, capability, and vision to allow you to make the most of a mobile workforce.

Notes:

<sup>1</sup> Pew Research, 2019 – <https://www.pewinternet.org/fact-sheet/mobile/>

<sup>2</sup> Forbes, 2019 – <https://www.forbes.com/mobile-workforce/>

<sup>3</sup> AIIM, 2019 – Implementing a Digital Workplace Strategy



## What's next?



Every organization in the world is on, or should be on, a Digital Transformation journey. How effectively you navigate this journey relies on how adept your organization is at combating the rising tide of information chaos. This requires new strategies and skills that extend beyond traditional ECM. We call this modern approach Intelligent Information Management.



This course explores how your role as an information professional is critical to accelerating business activities, enriching customer experiences, and improving operational agility.

You will learn how to:

- Create and capture information
- Extract intelligence from information
- Digitalize information-intensive processes
- Automate governance and compliance
- Implement an information management solution

The Foundations of Intelligent Information Management Workshop was designed as a primer for the Certified Information Professional exam. For attending, you will receive the CIP Study Guide and a voucher for one free CIP exam registration.

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# About **DocuWare**



Companies of all sizes use DocuWare to drive better customer service, improve efficiency, lower operational costs, support compliance by digitizing paper-based data and information, and automate business processes.

A new pace is set for worker productivity and business performance with DocuWare office automation solutions that deliver standard and customized smart digital workflows and optimal document control.

With flexible integration, full mobile capabilities and rated #1 ease of use with zero-compromise cloud services, DocuWare is recognized as best-fit for digitizing, automating and transforming key processes with over 500,000 satisfied users at 14,000 companies in 90 countries.

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# About **aiim**

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