

Digital Mailroom Transformation Nets Huge Efficiencies and Savings

Using automation to categorize, classify, and extract essential data from the document ensures that it delivers to the appropriate business process in a timely manner.

ABOUT US

Genus is a Kofax Platinum Partner with over 25 years of experience and a proven track record of solving complex digital transformation challenges. Genus Technologies focuses on listening to your needs and collaborates with your teams to accelerate business processes, optimize workforce performance, drive competitive advantage and eliminate risk.
genustechnologies.com

Introduction

While the volume and share of electronic communication constantly increases, every organization remains challenged by a daily flood of non-digital correspondence – mail, overnight letters, courier deliveries, and so on. This incoming mail and the ability to process the information it contains quickly, accurately, securely, and efficiently remains critical to support Government No Wrong Door initiatives and serve the constituents.

And as we all know, the Work from Home initiatives forced by the COVID-19 Pandemic resulted in a permanent reshaping of government workforces, with many staff continuing to work remotely or in a hybrid office and remote environment. According to Government Technology Events, “In a future ‘new normal,’ 36% of government IT leaders say ‘most’ of their workforce will continue to work from home.”

This distributed workforce has accelerated the need for government agencies to think differently about how they deal with physical mail. While some organizations have made technology investments to digitize and automate analog content very early in the business process, manual handling and routing of incoming mail remains very common. This presents a significant opportunity for process improvement and significant cost savings, particularly in light of the need to support remote and hybrid work models.

Mailroom Challenges

Processing the non-digital correspondence is a labor-intensive process that becomes increasingly more difficult and costly with multiple locations and remote workforces. It is generally understood that a large percentage of inbound mail items are transactional in nature and play a vital role in the performance of associated agency processes.

But capturing a document in digital format is not enough to keep business processes running smoothly unless it connects to the correct process and gets to the right person at the right time. Using automation to categorize, classify, and extract essential data from the document ensures that it delivers to the appropriate business process in a timely manner.

Manual screening procedures are slow and are often fraught with errors as correspondence is sorted, routed, delivered, opened, and read to determine content, before being forwarded to the appropriate people and departments for action. It is easy to see how quickly agencies can fall behind trying to process all this information manually.

Then there is the challenge of ad hoc mail that is not specific to an agency transaction. Those items must route in a timely fashion, to the intended recipients whether they are working remotely or in an office.

How can government organizations tackle the mailroom dilemma more effectively? The solution lies in an automation that, when it can, categorizes, classifies, and extracts relevant information from transactional mail items, support the effective distribution of ad hoc items, and adds measurable process discipline to everything the mailroom does. Organizations that step into the “modern mailroom” benefit from an extensive list of advantages, and those who have already made the switch are seeing measurable, tangible results.

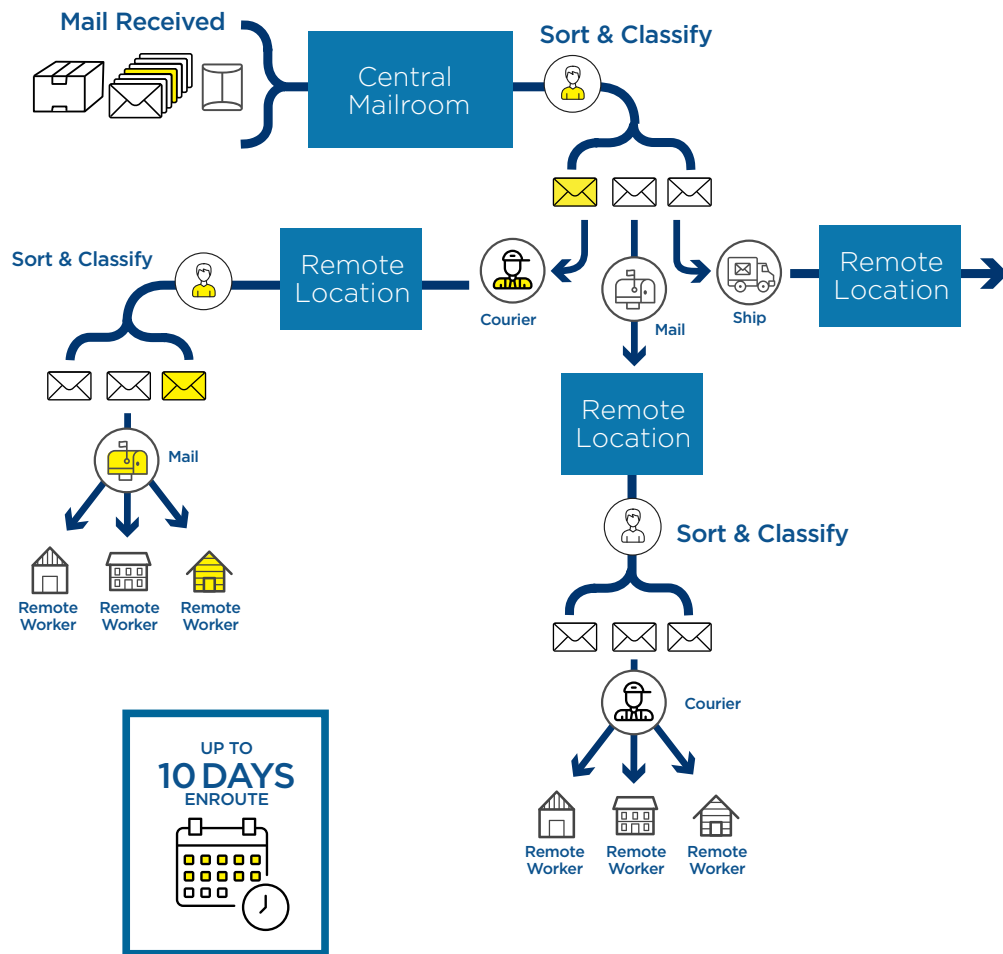
Manual paper-based routing results in:

- Limited or costly support for remote and at-home workers
- High courier and mail forwarding costs
- Slow workflow
- Poor customer and constituent experience
- Wasted knowledge worker time waiting for supporting information
- Errors related to manual data entry
- Inconsistent archiving and disposition
- Inability to scale
- Extra staff costs as mail volumes fluctuate

Consider the case of a state agency with a large central mailroom and multiple geographic locations. Their current shared services service level agreement allows for up to ten days of time between the arrival of a mail item and delivery of that item to the proper desk or department.

In a future ‘new normal,’ 36% of government IT leaders say ‘most’ of their workforce will continue to work from home.

Manual Mailroom Process and Sorting



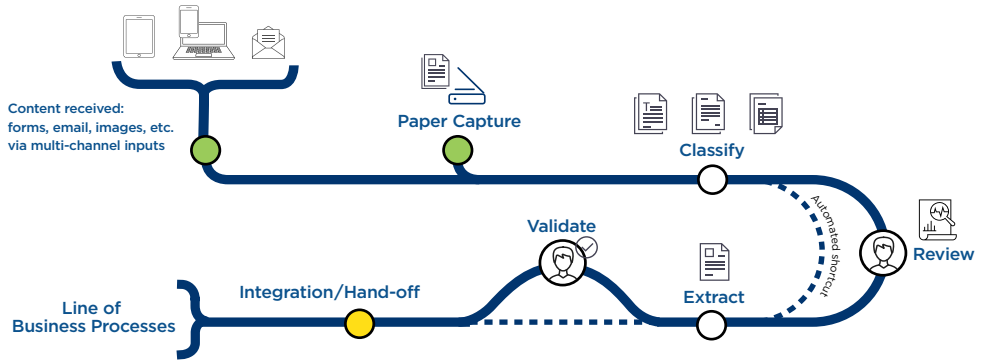
What Constitutes a Digital Mailroom?

Converting physical mail into digital form solves only a small piece of the overall mailroom challenge. Staff must still open the mail and send it through the machine that creates the digital version of it. There are excellent hardware solutions that add dramatic efficiency to that very manual process.

However, once the mail item is converted it becomes possible to leverage many technologies, including artificial intelligence (AI), to augment currently manual processing steps with the computer. Speeding up the process is, of course, a core benefit.

Conceptual Process of Digital Mailroom

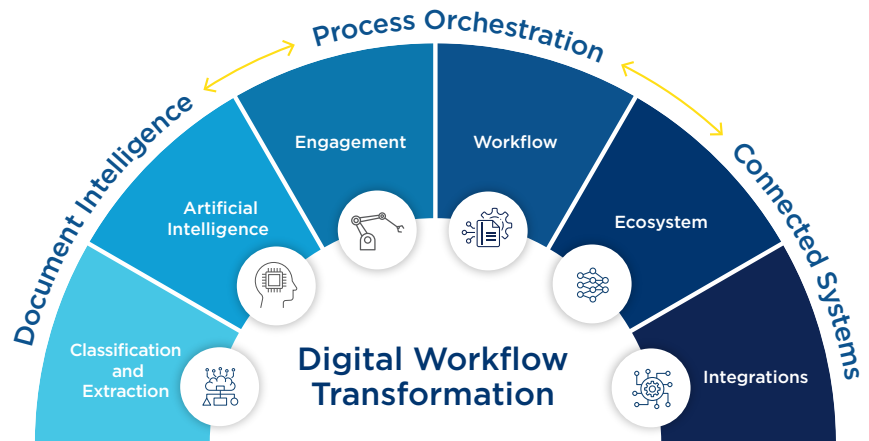
With the proper application of automation and process management, the shared services organization can comfortably **commit to service level agreements (SLAs) of one day or less**. And with the reporting and analytics capabilities available in the technology, they can easily measure, manage, and plan for the substantially reduced staffing levels digital mailrooms deliver.



Digital Workflow Transformation

The first step in a Digital Mailroom Transformation is Classification.

Classification is an attempt by the system to identify the type of document or documents the mail item contains. Known document types are used to train the system's artificial intelligence (AI) to classify at very high rates. Most often, documents that fail the classification process are simply ad hoc mail.



The next step is Extraction.

Extraction uses the machine to extract business values that make sense to downstream processes. Each class of documents has its own rules for extraction. These rules are established, again, by training the system's AI.

Extraction for unknown document types may be limited to addressee information. The addressee will provide a means of routing the document to the correct department or individual.

Together Classification and Extraction Constitute Document Automation

Document Automation, like all AI-driven applications is imperfect. Occasionally the system is not completely confident of what it extracted, or it fails to extract at all. So, staff must be involved to resolve the issue.

Process Orchestration and Engagement

Process Orchestration is just that—it coordinates the activities conducted by the machine and by the staff. Each logical piece of work (usually a mail item) moves through a process related to the type of work that it is. Staff is only involved when necessary. It is distinctly possible that a mail item, once opened, will flow through to the next business system in the process without staff effort other than what is required to open the envelope and digitize the documents.

Engagement is what facilitates staff involvement. It provides user experiences for managing and selecting the work to be done and the experience necessary for entering or validating business data associated with the item. It also includes the idea of notification where the process may, for example, send an email to the recipient of an ad hoc mail item to process the next action for the item.

By no means is engagement limited to internal staff. If a process requires input or a decision from an outside party, like a constituent, they too, can participate in a variety of different ways.

Integration is another key aspect. All business processes interact with other systems representing the enterprise **ecosystem** like core line of business systems, content repositories, financial systems, and so on. Flexible integration mechanisms, including Robotic Process Automation (RPA) allow the process to interact as needed and in real time.

One of the key advantages to having each and every mail item as a separate digital entity is that it becomes simple to understand the exact status of the item, in real time. The system also records the timing and actions of each step of the process. That data feeds into analytics and provides a dramatic amount of insight into processes and operations.

So, the technology parts that constitute a true digital Mailroom are:

- **Document Automation** utilizes **AI** and other techniques to **classify** and **extract** information from documents.
- **Process Orchestration** coordinates the actions of the systems and, through **engagement**, the staff and may leverage **RPA** to ensure the work gets done correctly and on time.
- **Integration** connects the digital mailroom to the business **ecosystem** for continued processing and content management.
- **Analytics** provides insight into mailroom processes.

A true Digital Mailroom brings the ability to rapidly scale to meet almost any business demand, particularly ones driven by completely unexpected world events. It also brings the ability to rapidly adapt to business process changes, be they driven by legislation or by a need to improve business processes.

Organizations can't
scale and respond with
conventional tools alone.

County Streamlines 10-day Social Services Processing Down to 1-Day

The Human Services organization of a U.S. top 50 county struggled with its ability to process social services forms and other content received, primarily through the mail, from its clients. Mailroom staff manually opened mail items, made determinations on the destination building, department, and, sometimes person for the item, sorted them into proper mail slots, and sent them off for delivery.

Error rates were high. Any item requiring rerouting went back into the delivery systems. Delays were common and the percentage of lost items was well beyond the service desires of organization management. Client service did not meet expected goals.

In searching for a solution to their client service challenge, they decided to implement a digital mailroom. Project goals included significant reductions from current SLA times, deep reductions in error rates, and elimination of lost items.

In the digital mailroom process, staff opened and scanned incoming documents. Automation determined the type of document, inserted the digital item into the permanent content management repository, and notified the responsible work group (based on document type) of its arrival. Mailroom staff electronically review and update documents the automation could not identify.

A previous ten-day service level commitment—that occasionally was not be met due to mail volume spikes—was reduced, in most cases, to one day or less. Error rates dramatically went down and since documents entered the permanent repository very early in the process, lost items virtually never occurred.

State Human Services Automates Classification and Routing of Mail to Offices and Remote Workers

As part of the State's Human Services, the child support recovery agency manages more than 85,000 child support cases in the state, which equates to over six million pages of paper documents. The files and incoming paperwork were stored across several office locations making it hard for everyone to access the files and track incoming data.

This agency had an overall goal to make the files available electronically throughout the agency, improve constituent service levels, process cases more quickly, and promote business continuity in the event of a natural disaster. In addition, they wanted to implement an electronic mailroom solution that could digitally capture new mail and quickly distribute it to workers located throughout the state.

The implemented solution automatically captured, classified and separated current files into 246 different document types at a rate of four pages per second with a 94% accuracy rate. The digital mailroom system digitally processes more than 80,000 pieces of paper mail documents and over 350,000 pages per month and are distributed electronically throughout the state as well as to select virtual home offices.

Before the new electronic mailroom system, it took more than 24 hours to manually distribute paper documents within an office and up to a week if the document needed to be moved to a different office. Now, documents are available throughout the system within a few hours of the mail arriving. Not only are workers able to be much more responsive to constituents and process more cases in less time, compliance and disaster recovery requirements have been met.

Summary

A Digital Mailroom solves many of the problems government agencies face with efficient, multi-channel document and information delivery processes that reach employees wherever they are. With a Digital Mailroom as the starting point, the mailroom becomes a high-performance, digital piece of the broader business process. And with the tracking, auditing, and positive control a Digital Mailroom brings, the agencies can efficiently and cost-effectively meet business demands or organizational challenges.

5

The top five advantages of implementing a Digital Mailroom are:

Reduced costs: Manual processing is slow and costly. On the other hand, automation with a Digital Mailroom reduces operating costs and enables scaling across the enterprise of both centrally managed and distributed mail handling operations.

Improved speed: Constituents and suppliers expect an immediate response to any communication. They do not care if mailroom volume is ridiculous on the day following a holiday weekend—they want answers. Applying appropriate amounts of automation easily shaves hours, days, and sometimes weeks from transaction durations. Day to day processing, and the ever-present exception processing, is handled in minutes.

Improved security and reduced risk: While shared services or mail room do their absolute best, it is all too easy to misplace a piece of important correspondence or have it fall into the wrong hands. A Digital Mailroom quickly moves that high-risk and high-security content into the digital realm where it is easily managed and properly secured. Business rules in that digital realm also ensure that your organization remains compliant with all the relevant regulations and laws.

Improved accuracy and customer experience: Even the most attentive workers make mistakes when manually entering data from documents into systems. Adding appropriate automation can virtually eliminate errors while dramatically speeding up processing. Constituents and suppliers will appreciate the quick and accurate handling of their inquiries and requests.

More visibility and actionable insight: Once the information coming into your organization is extracted, classified, and validated, it's converted to structured data that feeds your enterprise systems. You can monitor how well business processes are working throughout the entire customer journey and use actionable data to improve business processes over time.