

HUGE POTENTIAL: INTELLIGENT AUTOMATION IN DOCUMENT MANAGEMENT

Bridging the gap between the physical and the digital world has long been possible, even in administration and processing. Swiss Post Solutions (SPS), an arm of the Swiss Post Group with 7500 employees, is one of the leading drivers of this development worldwide. SPS processes well over one billion documents every year for over 1000 key accounts.

The fourth industrial revolution is well under way, but while the digital factory of the Industry 4.0 era is slowly taking shape in manufacturing, 80 percent of all documents in business and administration are still processed physically. People read written submissions, interpret their intention and, on this basis, they produce quotations or invoices, orders or complaints, statements of claim or other complex requests. They then enter the relevant information in software applications and trigger follow-up processes. Yet half of all these activities can now be automated – with technologies already available today.

Digitization offers opportunities for the companies and the workers alike, with machines taking on tiring, monotonous and repetitive tasks – around the clock and on 365 days a year. They work with high efficiency and almost error-free. In administration and processing, it is important today to redistribute the work between man and machine in many cases. It is clear that those who rise up and seize the opportunities of digitization in document management today will be ahead of their competitors in the future.

The challenge of unstructured data

The processing of unstructured data – once the greatest issue in dealing with digitized documents – was solved some time ago. If, for example, a customer notified a company of a change of address by email, a person used to receive the email, read the content, understand the intention and change the address in the CRM system. Intelligent automation systems do this job entirely independently today, recognizing the intention and converting the unstructured, freely formulated text in the email into machine-readable, structured data ready for processing. A software robot then makes the changes in the CRM system. The two main technologies are artificial intelligence (AI) and robotic process automation (RPA).

Information processing is becoming intelligent

AI can do tasks which previously required the input of human intelligence. It works by recognizing patterns instead of keywords, therefore even complex issues can be processed with great accuracy. The system „learns“ the process through continuous experience. It improves day by day and becomes more precise. Artificial intelligence delivers the structured digital data for the

next step in the process.

RPA is used in the automation of standardized transactions and process steps. Robots are configured in such a way that they will carry out all the steps in a process in the same way as a person has done before. These software robots work with existing systems on the basis of the user interface. When data are entered in a spreadsheet, the cursor even moves across the screen just as it would if the work was being done by a human.

Tried and tested in practice

SPS set up its first pilot projects three years ago in order to exploit the huge potential of this intelligent automation technology. SPS has been supplying an integrated solution for intelligent automation in document management based on a global platform for over a year. Data in physical documents are scanned by character recognition systems, contents are read using AI, and processes are automated with RPA. The small percentage of documents which cannot be handled by the automated system can be processed in an offshore center in Vietnam with over 1,500 employees.

Efficiency increased by robotics

In its work for a large German health insurance company, SPS uses OCR in the first instance to read the data from claims, income statements, receipts for out-of-pocket payments and other documents, and to provide them to the robot in structured form. If all of the necessary data are present, the robots start processing under strict observance of business rules. The customer account manager receives a status report at the end with the information needed to complete the process. The robot detects duplicates, e.g. a pharmacy receipt which has already been included in the additional collective pharmacy invoice, or missing records of payment for submitted invoices.

The robot solution is not only convincing in terms of the technology. It has also reduced the amount of manual work required by an average of 50 percent, thereby shortening the processing time accordingly. The insurance holders receive their refunds faster, and this helps to increase customer satisfaction levels; at the same time, the need for additional staff is reduced.



Jörg Vollmer, CEO of Swiss Post Solutions

Bringing intelligent automation to many sectors of industry

Intelligent automation pays for itself quickly. So it is not surprising that the pioneers come from the sectors in which document management is fundamental to business, such as banks and insurance companies. McKinsey estimates the automation potential at banks and insurance companies to be 67 percent in data processing and as much as 50 percent in data entry. This means that at least half of the jobs can be done by machines. The analysts see similarly promising prospects for automation in other services sectors. The technology analysts at Gartner see the segment in which SPS is working as a market worth billions. The use of RPA alone, according to Gartner, is set to quadruple in large organizations in the next three years. Significant leaps in development are also to be expected, given this rapid growth. The Swiss Post Solutions approach is to take responsibility for the processes as a BPO partner and, in so doing, to bear the full burden of the technology risk for its clients. In adopting this method, SPS is making a key contribution to exploiting the opportunities of digitization quickly and with a view to increasing efficiency.

The author

Joerg Vollmer is leading SPS, a global outsourcing provider for business processes solutions and innovative services in document management. He has gained a thorough understanding and intuitive feel for the dynamics of the BPO market and future trends through his experiences from similar senior positions in the technology industry. Joerg joined Swiss Post from Hewlett Packard (HP), where he had held management roles for over 20 years, most recently as Vice President Business Process Outsourcing (BPO) for Europe, Middle East and Africa. He has a degree in Economics and a MBA in International Business Management.