



YOUR DIGITAL WORLD,  
DELIVERED

**CREATING AND  
DELIVERING**  
MISSION  
CRITICAL DIGITAL  
DOCUMENTS

BUSINESS CASE

# DOCFUSION, DRIVING AND UNDERPINNING

Is it not strange that most organisations are driving massive digital strategies. They are engaged in things like "Kubernetes Cluster Monitoring", "Data Streaming at the speed of light", "Analysing our every move" and still 70% of all business processes are paper or email based. This problem is now beginning to become main-stream and is impacting customer experience significantly. Companies digitise back office processes to reduce cost rather than to improve customer experience by digitisation the interaction with their customers.

Document generation and automation may not have been in the top ten of companies' IT priorities in the last number of years it is now, however, moving to priority one or two.

Most organisations are somewhere on the road in solving the above but frankly if they still have paper documents, their journey is not complete.

The business issues resulting from not employing the full smart document automation tools are shown below.



Over 70% of business processes are **still document and e-mail based**

**Unhappy customers** filling out paper documents and receiving documents riddled with errors

No possibility of effective document management

Slow turnaround times

**HIGH COST ERRORS** which can drastically affect the bottom line

No means of **effective collaboration**

**Unprofessional interactions** which damage a **company's reputation**

**Incomplete documents** being sent for rework

Documents not going through the correct approval processes

Huge administration departments **manually populating data**

**Inconsistency of customer experience**

**Documents not legally compliant**

**No ability to digitally sign**

Low productivity

When one looks at the processes that need to be automated, failure in these can lead to catastrophe.

*DocFusion® helps customers digitally automate all communication with their stakeholders. It does so using an intelligent platform that merges data from back office systems with easy to build document templates.*

*Intelligent document generation and automation is not a process of scanning, OCR and storage it is rather the digital ingestion of information into smart automated templates and normally integrates the elements of:*

	<b>Yes,</b> I do have this capability	<b>No,</b> I do not have this capability
1. Smart Digital Template Creation	<input type="checkbox"/>	<input type="checkbox"/>
2. Workflow	<input type="checkbox"/>	<input type="checkbox"/>
3. Document Generation	<input type="checkbox"/>	<input type="checkbox"/>
4. Digital Signatures	<input type="checkbox"/>	<input type="checkbox"/>
5. Document Management	<input type="checkbox"/>	<input type="checkbox"/>
6. RPA and AI	<input type="checkbox"/>	<input type="checkbox"/>

*The DocFusion platform can incorporate all of the above or integrate with the components that an organisation already has in place.*

# DOCFUSIONS TEMPLATE LIBRARY

*A fundamental precursor to intelligent document generation and automation is a robust centralised template library.*

The DocFusion® template designer, is a plugin to Microsoft Word. This makes template design very simple for the end user to execute. Using simple no code drag and drop, users design their own templates without the need to wait for the services of the IT department.

Template management improves the productivity of and provides the ability to standardise the organisation by always having the correct template on hand. Brand integrity is embedded as once branding and styling has been changed, this becomes the standard within the organisation. Legal documents are authentic ensuring compliance, as are letter heads, product specifications and much more.

## DOCUMENT TEMPLATE REPOSITORY



LEGAL



MARKETING



COMPANY  
SECRETARIAL



TECHNICAL



OPERATIONS



RISK AND  
COMPLIANCE



CUSTOMER  
MANAGEMENT



OTHER

*“Forrester research demonstrated that by deploying template management companies achieved a significant productivity uplift for end-users, branding teams and IT teams, by simplifying the process for updating and using an organisations templates and branding assets”*

Central cloud based template repositories ensure that the correct documents are always available across the organisation be it locally or globally. If for example regulation changes, logo's change, directors change or legal terms change, this change is effected once and available to everyone immediately.

Templates play a huge role in ensuring organisational health, however, on their own they are static and do little in moving a company ahead in their digital transformation journey.

*Without a robust template library, the journey to digital transformation is practically impossible.*

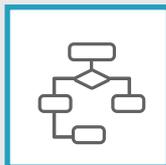
## THE PILLARS OF DIGITAL TRANSFORMATION

**DOC  
FUSION®**

**DIGITAL  
FORMS**



**WORKFLOWS**



**DOCUMENT  
GENERATION**



**DIGITAL  
SIGNATURES**



**DOCUMENT  
MANAGEMENT**



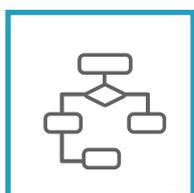
# THE PILLARS OF DIGITAL TRANSFORMATION

*The elements of the digital transformation journey are described below. It is important to note that an organisation can only fully digitise if the digital template library is complete above.*



**1.**

DIGITAL FORMS



**2.**

WORKFLOW



**3.**

DOCUMENT  
GENERATION



**4.**

DIGITAL  
SIGNATURES



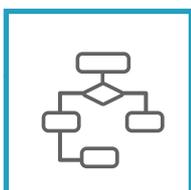
**5.**

DOCUMENT  
MANAGEMENT



## DIGITAL FORMS

Data input forms allow you collect information about a person or organisation that will kickstart a process or set of activities. Forms have no intelligence in their own right but provide basic data that is not available through different means. A form for example may capture a person's name address and telephone number, it may indicate a persons preference, budget or other such data which is important in ensuring optimal service. In the most basic, a form may capture a persons identification number to forms that require more detailed information.



## WORKFLOW

A process is a predefined set of activities that have to be performed to achieve a desired output. In most paper based organisations this desired output is a completed contract or agreement of types. For the process to be successful, it should be accurate, timely, and approved by the relevant people. DocFusion manages the processes from the handoff from legacy systems to interaction with all parties external to the organisation.

DocFusion ensures the accuracy of documents by applying logic to pre-defined fields. It integrates with most mainstream process automation tools which move the document to different individuals or stages and ensures that all approvals have been obtained. DocFusion ensures that all information is completed in the correct fields prior to moving the document to the next stage in the process.

*DocFusion® document generation centre combines all the pillars of an organisation's digital journey*



## DOCUMENT GENERATION

DocFusion generates documents through providing intelligence to

a template using its rules based engine. This removes manual tasks, duplication of effort and eliminates the need to make changes to the LOB system to facilitate the document template design. DocFusion has a document template library in the cloud which is connected to a clause library. DocFusion is role based which means that department dependent (like legal, Marketing) company clauses can be maintained by different users (roles).

Another key feature of DocFusions document generation capability is the ability to link data to the documents through smart connectors and API's. Again all manual work is automated and there is never any duplication of effort.

This ensures the automation of work through automatic document population. Accuracy is ensured through the consistent application of a predefined rule-set. Security is ensured through controlled access to authorised individuals predefined sections of the document.

Process maturity is driven through these document generation features and many process steps are fully automated.

Analytics around the use of documents and document flow are part of the standard functionality provided by DocFusion. It will also reduce the need for complex RPA implementation by automating a part of the process by DocFusion before applying RPA.



## DIGITAL SIGNATURES

For efficient process automation, documents must be digitally signed.

In an age where people work together across the globe the need for digital signatures is paramount. Digital signatures complete the digital journey which is the last stage of document approval.

DocFusion's digital signature capability is fully integrated in the Document generation and signing process which means that the while you create the template you can indicate where the recipient has to initial and to sign. The workflow capability will enable you to have multiple people digitally signing the same document based on the designation and levels of authority.



## DOCUMENT MANAGEMENT

DocFusion completes the process by storing the completed document

with the data and the digital signature to the Document Management System (DMS) and sending if required all the relevant data back to the organisations LOB systems.

With DocFusion data is digitally ingested and is indexed and classified automatically. While the template is stored in the template repository, the data is transferred to the legacy systems, time stamped and immutable. These documents can be created on the fly or in batch, depending on the requirements.

# DOCFUSION BUSINESS CASE

*The business case for DocFusion is easily made on multiple levels:*



Customer experience  
management



Reputation  
management



Productivity  
improvement



Cost  
reduction

## 1. CUSTOMER EXPERIENCE

This is frictionless without the need to print, sign scan. The available data is pre-populated so the customer does not have to duplicate effort. The document cannot be submitted with missing fields so there is no to and fro. Although difficult to quantify we believe that this results in higher customer take on and less customer churn

## 2. COMPANY REPUTATION

A company's reputation is based on many factors, one of the important one being professionalism. DocFusion drives this professionalism by ensuring that all document-based interaction, is styled correctly, correct logo's, correct versions, correct details and much more. In a digital age where the only interaction with the outside world is electronic ensuring this is a reputational prerequisite.

## 3. PRODUCTIVITY IMPROVEMENT

Forrester estimates that over 20% of a knowledge workers time is freed up by having the correct digital documents available, routed, digitally signed and stored.

## 4. COST REDUCTION

Docfusion's rules engine and smart API's eliminates the need for data input and manual intervention. This can save up to 30% of the manual intervention. In addition to this there is normally big cost reduction through the replacement of multiple disjointed systems.

*DocFusion ensures frictionless  
interactions through the automatic  
generation of contracts*

**DOC  
FUSION**<sup>®</sup>



Risk and compliance



Omnichannel marketing



Employee management



Digital and paperless

## 5. RISK AND COMPLIANCE

With DocFusion all data is current with the correct legal terms, correct approvals, correct clauses. Up-to-date electronic templates ensure the correct information the company and outside parties must provide is in line with policy and law. A regulation change is updated once centrally and is immediately included in all relevant documents. This reduces legal and other risk and increases compliance.

## 6. OMNICHANNEL MARKETING

DocFusion communication templates ensure consistent messaging organisation wide. This can be communicated via web, mobile, sms and all other relevant channels. This ensures consistent messaging and not inconsistent from multiple legacy systems.

## 7. EMPLOYEE ENGAGEMENT

A new employee's first interaction with a company is in completing their employment contract. DocFusion ensures this is a frictionless interaction through the automatic generation of the contract through pre-population from forms and automated rule based clause provisioning.

## 8. DIGITAL AND PAPERLESS

DocFusion not only drives a company's digital agenda but also makes it more environmentally friendly through the eradication of paper. Many forests can thank DocFusion for their continued existence.



↑ Customer Experience



↑ Customer Reputation



↑ Productivity



↓ Cost



↑ Omnichannel Communication



↑ Employee Engagement



## SUMMARY

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*The generation of an electronic normalised template library is key to digitising your organisation, but that in itself is static. Adding to these templates a dynamic rules engine begins the true automation journey. Using workflow to call up these documents and automatically populating these templates using smart data set matching and connectors to legacy systems. The workflow then moves the document for approval, digital signature and lastly indexing, classification and storage.*

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