

PAPYRUS SOFTWARE

How to Support Your Clients and Employees in the Digital World

By Papyrus Software

**Digital
Experience**

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Digital Experience Economy

Have you ever tried to enter 'Customer experience' in the Google search? At the time of this writing, you'll get over 3.470.000.000 results. Even 'Digital transformation', which is one of the most overused terms in the tech industry today delivers 'only' about 492.000.000 results - almost 3 billion entries less.

The chatter that revolves around people experience, including Customer experience (CX), Employee experience (EX), as well as User and Multi/Omni-channel experience can sometimes be pretty loud and confusing, but it clearly shows that we are in the digital experience economy.

In this experience economy, the memories, emotions and feelings that customers take away when interacting with a business are ultimately what matters most. Yet, achieving a great customer experience is not easy. As the overall customer experience is the net result of all experiences - the good ones as well as the bad ones - it means that every interaction counts.

Many have been trying to measure customer satisfaction and have plenty of data as a result, but the problem is that measuring customer satisfaction does not tell anyone how to achieve it.

Today, it is widely recognized that the customer experience needs an orchestrated team effort. If you look for instance into a customer going through just one of the customer journeys – for example, returning or replacing an item - it shows that a number of teams and departments, such as customer service, packaging, shipping, accounting, etc. are involved.

This all boils down to a simple fact. You cannot take good care of customers unless you take good care of your internal processes and your staff. In other words, you can't have great CX without great EX.

Here, it's everything about being motivated, well-trained, connected, efficient, and having an access to the right content at the right moment, raising questions, such as: 'How do your employees work?' 'What are the tools they are using?' 'How are they using them, and how they are using them together to ensure they can optimally deliver top customer service and CX?'

“ Leading companies understand that they are in the customer-experience business, and they understand that how an organization delivers for customers is as important as what it delivers. ”

–McKinsey



Content is Pervasive

Content, and more specifically documents, is the cornerstone of customer and employee interactions. Physical and digital content is part of just about every business process and interaction, whether it is a contract sent from a customer as an email attachment, a paper invoice mailed to an accounting department or a large volume of sales orders in a folder.

Enterprise-wide there are rising expectations for more convenience, customization, personalization, and control:

- Customers expect consistent, personalized content across print, web, mobile, voice, video and messaging channels.
- Employees working on handling customer requests require fast access to information for both knowledge and efficiency.
- Legal and compliance teams need access to a wide range of corporate content for e-Discovery purposes.
- There is a growing need for finance, human resources, sales and marketing solutions like Contract Life Cycle Management or Purchase to Pay, as well as enterprise-wide use of key business systems, such as Salesforce and SAP for which content is a key component.

Understanding and having instant access to corporate content and business documents is critical, otherwise one could miss out on important insights about customers, services, trends, risks and opportunities.

Are you ever missing that one piece of information related to your task that would make it simple? Are your employees hunting for data about the data and switching from app to app to accomplish work?

If so, read on – this paper is for you.

Employees working on handling customer requests require fast access to information for both knowledge and efficiency.

Where to Start?

Start with a Content strategy.

The content services strategy will address the entire content lifecycle – from content creation to final archiving, supporting your business operations *and* the Digital Workplace where the work gets done. This will help you know what information you have and where it is, and ensure that your business data and documents work together to provide a single source of truth.

With a good content strategy you can make sure that your enterprise content is:

- **Always available** regardless of point of origin, location (inside or outside of organization) or device
- **Classified and contextualized** with extracted knowledge and insights
- **Relevant and presented to the right user at the right time**
- **Integrated into where the work is done**
- **Protected with security and privacy controls** ranging from granular access control to data loss prevention, and
- **Governed** with appropriately applied information governance controls

But, strategy alone is not enough. Without automation technology that digitizes content, eliminates manual processing and orchestrates work, your organization will suffer from lack of efficiency.

What You Need to Know

At most organizations, the problem is more that they have too many tools than that they have too few.

There are different content solutions in use:

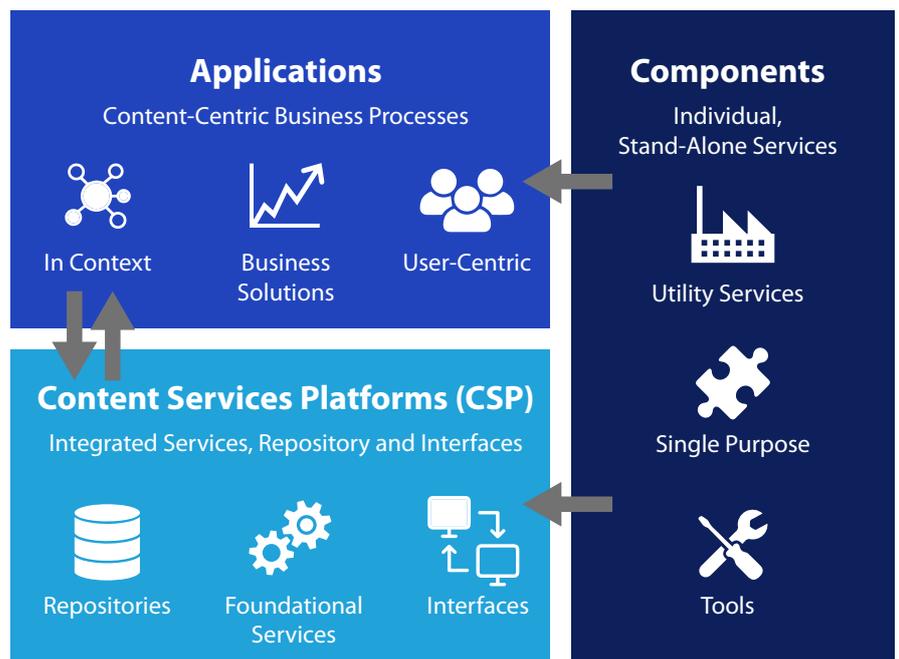
- **Employee-centric content services** that provide technology for improving employee collaboration and are integrated with digital workplace technologies and office productivity suites.
- **Customer-centric content services** used to deliver customer experiences across traditional and digital channels, and handling composition, management, delivery and optimization of digital experiences across multiple channels and touchpoints in the customer journey.
- **Archive systems** for content archiving and digital discovery of legal matters, and
- **Diverse solutions to content-centric business problems**, like Contract Lifecycle Management, Purchase to Pay, Claims Management, etc.

Often there are no hard boundaries between the systems, the functionality depends mostly on the vendor and product. So for instance, a system supporting customer experiences can also deliver employee experience or it can as well take care of storing the content to be used during the customer engagement cycle, and provide archiving and records management. Similarly, in addition to supporting legal teams, e-discovery solutions can as well provide enterprise search capabilities to employees, competing with employee-centric content services, etc.

Working with too many tools to capture, manage, deliver and store content inevitably generates content silos and forces employees to work across multiple systems. This generates friction, slows down the process, and has a chain reaction impact on all downstream activities.

For this reason, companies are looking to strike a balance between their content services portfolio and meeting their specific business needs.

Content services platforms (CSPs), which enable content consolidation and work across content silos, are designed specifically to meet this need.



Content Services Platforms (CSPs)

A CSP can be viewed as the central backbone that provides the underlying information service. It provides a repository where content is stored, as well as where basic content services for ingesting, accessing, and processing content are provided. On top of it, additional Content Services Applications and Components can be provided to extend the core CSP capabilities.

Content Services Applications (CSAs) provide people-centric access points to the content in various business contexts, allowing users to consume content in a streamlined and specific way.

Unlike CSAs, **Content Services Components (CSCs)** provide utilities that can be used in different business services and integrated with Content Services Applications with business-specific user interfaces and support for appropriate channels, like desktop, web and mobile.

Content Service Applications (CSA)

Examples of Content Services Applications (CSAs) include:

- **Real-time online collaboration**
- **Access to enterprise content in the Portal or via Mobile** (e-Delivery, customer self-service, employee productivity applications, etc.)
- **Customer Communications Management** – Allowing users to create, deploy and manage communications directly to clients.
- **Case Management**
- **Contract Lifecycle Management** – Support for the entire contract management life cycle, from generation to signature to ongoing management
- **Project management**
- **Claims Management**

Content Service Components (CSC)

Examples of Content Services Components (CSCs) include:

- **Capture services** - Capture unstructured information from a multitude of channels, including paper, email, mobile and social.
- **Content intelligence** - Extract insight from content in many forms — including image, video and text intelligence — through the use of machine learning and other techniques.
- **Workflow/Process Management** - Enable the configuration of workflow- or process-driven applications.
- **Connectors** for integration and federation of multiple content services
- **Digital Signature** - The ability to digitally sign documents, replacing the need for a physical signature (e.g., in an approval process).
- Applying content-related **information governance** for risk management and compliance reasons

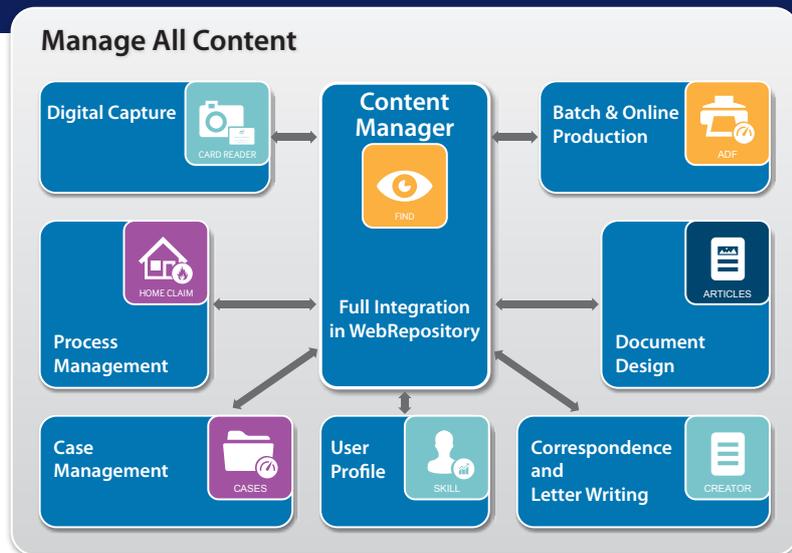
Papyrus Content Services Platform

Papyrus Content Management provides all Content Service Applications and Components mentioned above.

The solution goes beyond pure 'document storage' and allows companies to provide employees, partners and/or customers with a secure, selective access to any relevant information, such as regular business communications, outbound correspondence, incoming documents, e-mails with attachments, chat, fax, voice or video and any other content with meta-information.

The CSP repository provides support for distributed storage with central index and serves as a general storage for large amounts of data. Every object in the system - all formats (AFP, PDF, PDF/A, TIFF/ FAX, msg, eml, xlsx, docx, audio, video...), entire workflows and complete CASES (data, processes, activities, content, views, service interfaces (SOA)) – can be automatically archived at a specific point in time with the support of specific storage and management attributes.

The solution acts as single point of access for any sort of search, query, check-in, check-out or modification via desktop, portal, online and mobile. The scenarios cover BOTH access to 'live' documents during the Customer Engagement Cycle, document e-Delivery, and enterprise-wide collaboration and long-term archiving with Blockchain secured contents to ensure that stored content cannot be corrupted and may be audited on demand.



Engagement-Centric System for Collaboration

Support for content creation, collaboration and operations with an internal access for staff and secure online Web access for customers and partners to any content including complete cases with inbound and outbound mail and call recordings, provided exactly as it was recorded, via standard Web browser, Portal and Mobile.



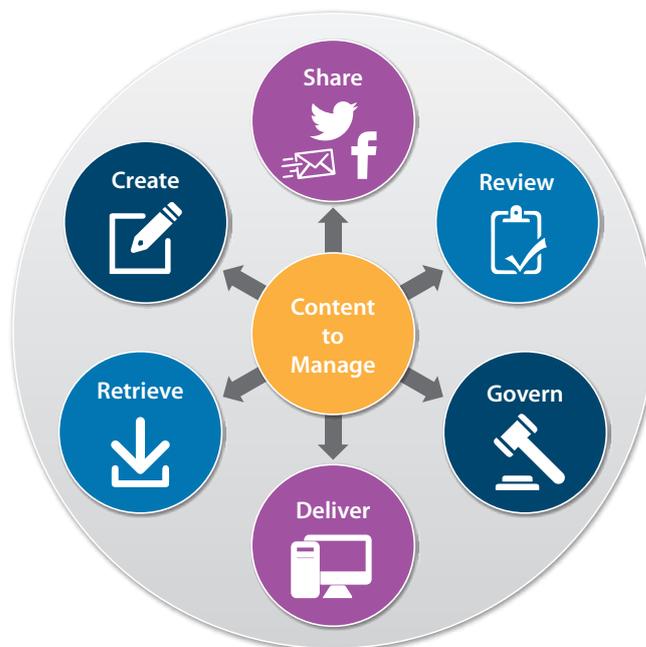
Governance-Centric System for Legal

Any object in a system can be archived at a specific point in time with support for specific storage and management attributes. E-Archiving of documents and metadata can be done in a legal manner with certified digital signature and based on retention periods and automatic document deletion by document category/type.

Collaboration in a Single Work Hub

The system provides employees with the information they need, when they need it with a full customer contact history and access to customer data, documents and communication channels and a detailed insight in relevant customer interactions and transactions, as well as relevant information from the knowledge database in a Single Work Hub.

Employees work in an intuitive way with a 360-degree view of the customer and can directly accept customer requests via synchronous channels (telephone, video call) and asynchronous channels (email, letter, etc.) in a single user interface. Front-end customer interactions are connected to the back office, and all customer interactions across channels - email, telephone, fax, website, chat, SoM, etc. – made available without delay. User interfaces can be adapted to specific needs of employees and equipped with reminder and templating functionalities, as well as integrated communication via chat, web, wikis, blog and social media for active collaboration on the customer's case.



Every customer request is associated with a case that follows interactions with the customer and captures the entire information on the overall processing of the request over a period of time. Requests can be automatically assigned, processed and forwarded, while intuitive wizards guide employees in handling specific processes.

Content can be shared with persons and departments, as well as with customers and partners by e.g. attaching the content to an email and sending it out, knowing exactly what was shared with whom and when, while built-in version control keeps track of all modifications - who created the new version of the content, when and what changes were made. Check-in/check-outs are logged and available via reporting, system logs and auditing.

**“User Trained Agent”
Machine Learning technology
supports the staff in decision
making and provides ‘best
next action’ suggestions.**



Integrated Intelligent Capture

An integrated Multi-channel Intelligent Capture CSC dynamically integrates incoming customer information coming via corporate website, email, mobile, social, chat, etc. and makes it immediately available to employees. Papyrus Capture digitizes analog paper, classifies documents, extracts the information, validates the data, stores the digitized copy with its meta-data in the matching case, as well as storage. Automated AI-supported unified recognition and rule-based assignment to employees, systems and processes helps employees quickly and reliably understand requests, assign them correctly and in 'real time/near time' deliver the answers.



Integrated Customer Communications Management (CCM)

An integrated Customer Communications Management (CCM) CSA provides organizations with a closed loop inbound-outbound communication and allows employees to create any required document and customer communication directly in the Work Hub. Users can create a document on the fly by choosing document templates and performing in-document editing, or they can use the Papyrus Wizard for assisted document creation and quickly respond to the customer and partner, exchange documents, provide an offer, sign and close the business. The communication is generated and delivered directly online, via e-mail, on mobile, or via any other output channel.



Integrated Adaptive Case Management

The routing as well as all workflows in the system are based on the integrated Papyrus Adaptive Case Management (ACM) CSA and can be freely defined and configured according to customer requirements. All interaction, reviewing, and sharing of content make use of the built-in collaboration capabilities of the Papyrus ACM, basically sharing, pushing, updating, assigning and re-assigning the work, including the relevant content.



Integration Services

Integration with content systems, communication channels and business applications is performed in a facilitated way via a set of configurable connectors, Papyrus Adapters.



Frictionless Processing

Users can search using document indexes, full text search or taxonomy searches and retrieve any stored communication for document viewing, re-printing, re-sending to the end customer or for any other purpose, as needed. The information can be presented in various layouts, delivered to customer portal for download and print, and made automatically available in the work hub, where the work is done.

There is no need for employees to 'switch' between systems and channels, ensuring work in a frictionless way, resulting in significantly higher processing speed, increased First Time Fix Rate (FTFR) reduced costs per customer request, and boosting both CX and EX.

Archiving for Legal

The Papyrus CSP comes with an integrated access control system, and offers data protection and privacy, as well as the location management to comply with legal requirements.

All types of content can be made revision-proof. This applies not only to PDF/A standards, but also Office documents, email, Web documents, chat and more. The system provides Blockchain notarization to ensure that files, document, data, processes stored in Papyrus Content Services Platform cannot be corrupted and they can be audited on demand. Digital Signature is provided via Papyrus Sign® that works together with trusted legal entities like Signaturit or DocuSign to digitally sign documents.

The system can be flexibly configured for legally required deadlines with automated document deletion upon expiration. Retention periods, as well as what happens to the content after the retention period is over, are fully configurable, and supported with automatically generated notifications per email, SMS, and Papyrus Inbox based on rules.

Governance is supported by checking the flow of processing and provides transparent traceability, monitoring and evaluation (who changed/edited what, when). The high availability of the system is implemented and guaranteed by a Stand By/Fail Over solution architecture and servers that can automatically take over the application in case of failure.

COMPLIANCE



Where to Plug In

'The next step is "plugging in" the Content Services Platform into your digital strategy.

What are the benefits of acquiring a Content Services Platform as they relate to your strategic transformation initiative?'



Improve Efficiency

The core advantage of leveraging a Content Services Platform is efficiency, transparency, and enhanced customer and employee experience. Already by using an Inbound Mail Capture to automatically classify, extract, and connect key data and insights with people and processes, organizations can achieve high return on investment by reducing processing time from weeks to hours. Using the central content services platform with freely combinable applications and components, such as capture, customer communications, digital signature, and case management is a huge step forward, allowing frictionless end-to-end processing of customer requests, and resulting in world-class customer service and tremendous efficiency gains.



Enhance Employee & Customer Experience

In the highly competitive digital market, being able to provide a top notch customer service fast is essential to organization's success. Papyrus Content Services go beyond isolated channels, and isolated business and content systems and make content, information, processes, tasks and activities available wherever and whenever they are needed, enabling employees to provide answers to specific questions and optimize customer experience. Imagine if you could have data from any source, collaborate with your colleagues and converse with the customer - all from a Single Work Hub. This allows you to deliver a service to the customer in a way that was not possible before.



Adaptivity, Flexibility, Transparency

Everything – from user interfaces to content to processes – can be adapted to your way of working, allowing modeling, monitoring and optimizing the processing according to your KPIs.



On-Premise or in the Cloud

The peer-to-peer architecture of the system allows unlimited scalability in support of your business growth. Running Papyrus in a Cloud is not different from running Papyrus products on regular hardware, allowing for hybrid or pure Cloud solution according to your needs.

Next Steps

Are you interested in learning how to use the Papyrus frictionless approach and quickly configure content-centric application, such as Contract Lifecycle Management (CLM), Project Management (PM), etc. on top of the same Content Services Platform? Do you want to multiply the effect of all integrated applications and components to improve efficiency and deliver great CX and EX? Contact us today for more information on your Content Services strategy and next steps at info@isis-papyrus.com.

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