A Case for Outsourcing Document Imaging
Introduction

An effective document imaging solution ensures paper-based data in the enterprise is consistently captured and made accessible to all required staff and stakeholders through a central repository. Supporting ECM systems also enable real-time routing of this information to the appropriate departments or employees for decision-making and action.

The first point of contact for inbound content entering an organization is often capture through imaging; in this way, document imaging is the welcome mat for your organization’s working data. It is essential to ensure a proper introduction and assimilation of this incoming content to your information ecosystem, just as you would welcome visitors to your home and business.

What would you say are the three biggest drivers for scanning and data capture in your organization? 1

As seen above, respondents perceive several incentives to using scanning and data capture systems. Notably, improved searchability (efficiency) and shareability (collaboration) top the list as the most desirable reasons to deploy capture and scanning. This is followed by improved process productivity, reduced storage space (cost savings), and faster response to customers, with support for mobile and remote work. This in mind, there are many reasons to consider a document imaging solution for your enterprise, but it is very important to choose the right solution for your particular business needs.
In-house vs. Outsourcing

When considering an imaging solution, you need to make a fundamental choice; that choice is between outsourcing, in-house document capture options, or a combination of both based on your specific needs.

In recent years, improvements in technology and increases in vendor support for outsourced document capture services have allayed many organizations concerns about outsourcing data. With the maturing of enterprise content and information management technologies and ideologies, capture vendor offerings, too, have evolved—both for ongoing long-term support, as well as for one-time or periodic reinforcement of in-house capture capabilities in times of high-volume influx.

Imaging services also range in broad scale from basic scanning and/or indexing to providing key functional support for targeted throughput of large-volume transactional documents, and time-sensitive data delivery to enterprise systems.

In this article, we focus on outsourced imaging, and review what added value outsourcing offers, as well as the challenges it may pose.

Key Considerations

First, evaluate a few variables that should be assessed before choosing a third-party imaging service. When considering outsourcing imaging services think about quality, trust and cost. Let's examine these closer.

Quality

The term quality in the context of document imaging includes image quality, file consistency in name or format, ease of accessibility to outsourced content, mature image capture policies, software, infrastructure, best practices, or routines carried out by the third-party image capture vendor.

It is vital to consider quality when choosing an outsourced imaging vendor. The best third-party solutions will have quality control functionality embedded with the imaging process. Often, the imaging polices, infrastructure, and software implementations in third-party imaging vendors are highly advanced. Also crucial to quality assessments, established vendors that have many years honing practices for optimal pliability, security and efficiency allow quicker, more efficiently adaptable, and more accurate imaging solutions than the buying enterprise would be capable of in an in-house alternative.

However, problems such as poor image quality, inattention to maintaining file formats or naming conventions, or frustrations receiving or retrieving content could all possibly arise in less performing vendors, and cause unforeseen costs or delays to business processes; in truth, the person who shoulders the most responsibility in regard to properly managing your data is you. With that said, the third-party should not be expected to have infallible knowledge of all the necessary nuances dictating how to manage your organization's content. It is the organization's responsibility to clearly articulate expectation in terms of all critical elements in delivery, and to instruct the third-party in their personal data management requirements. When evaluating imaging vendors, the importance of careful, upfront outlining of distinct criteria expectations—from indexing and image quality to delivery timeframes and exceptions-handling procedures—cannot be understated.

A smart practice is to treat your outsource partner as you would an employee, and audit their process and quality regularly to ensure your requirements are met.
Trust

Trust is very important when choosing the right third-party imaging solution. Outsourced document imaging requires large amounts of sensitive content be processed off-site, therefore increasing risk of a security breach. These worries are compounded by distance. If for example, the outsourced imaging vendor is located abroad there may be differences in regulations that could add uncertainty to how your data is managed. It is therefore crucial to evaluate third-party service providers with the same stringency you enforce for in-house data handling.

It may seem like a lower risk to keep imaging of sensitive data in-house, as your employees likely inherently understand the importance of protecting sensitive data as well as the consequences of not doing so. Keep in mind that while secure data-handling and adapting to constantly changing requirements is a central tenet of imaging providers’ business models, it may not be as central to those that often staff in-house scanning operations.

Always remember that the provider or staff you choose for your imaging needs must adhere to your requirements, including meeting your regulatory, legal, and industry compliance standards.

Cost

How much would the outsourced imaging service cost? Take into account, not only the monetary value, but any hidden costs or criteria that could affect the true benefit to outsourcing. For example, it is important to be aware of the time implications regarding the transfer of your content to the third-party site, and back again to your organization’s business processes awaiting that content—especially if the vendor sites are located across the country or overseas. The cost implications, if outsourced capture requires unexpected additional processing time, could be a disruption of optimal operation of your business processes relying on that content that in turn, stall other business processes.

Therefore, it is important to understand that business processes may need adjustments to accommodate, and that the vendor should be able to offer options to minimize time delays—like secure cloud upload or EFSS transfer—to ensure processes and deadlines are not affected should you encounter new content or processes that need a faster turnaround window.

On the other hand, outsourced image capture can provide considerable costs savings in terms of monetary value and soft-benefit ROI. Reliable, near real-time import of time-sensitive content into enterprise systems enables you to provide better, faster, more transparent service. And since your imaging systems are taken care of by a third-party, your organization does not need to invest in its own expensive imaging capture implementation, the facilities costs (space, electricity and cooling) are eliminated, and there is no investment in human resources to maintain and run the technology. All cost benefits.

Finally, you have the freedom to gauge and adjust the capture process, learning from the experts the best practices for your specific business processes and gaining awareness of the best-in-class technologies for imaging. This offers a low-risk path to a smooth transition down the road should you elect to bring imaging in-house for some or all of your capture requirements.
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Conclusion
Serving as the first point of contact for incoming content to an organization, data imaging solutions often work behind the scenes, pumping that data from the heart of the enterprise to all other departments, ensuring a healthy and secure information management environment. For this reason, it is paramount that your business chooses the right solution for its particular business needs. Outsourced document imaging makes a strong case for adoption, offering cost advantages and experience that your organization may be unable or unwilling to match. Finding a trustworthy, outsourced imaging vendor with mature imaging policies, process, and an attention to your specific needs, could be invaluable to your capture process.

References
1. AIIM Industry Watch Paper free Progress – measuring outcomes www.aiim.org/research

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