WORK LIKE TOMORROW.™

Beyond RPA: 4 'Bigger than Bots' Case Studies

How Combining RPA with Complementary Technologies
Accelerates Your Automation Journey

KOFAX

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Introduction

Got bots? They're a simple way to automate many of your repetitive tasks.

But while robotic process automation (RPA) is a compelling technology, digital transformation is about more than automating repetitive tasks. It's also about capturing information from documents and systems, understanding it and delivering it where it's needed. It's about orchestrating automated and human tasks and understanding what is happening throughout the entire process.

Kofax RPA™ stands out in a marketplace crowded with point-solution vendors because we think bigger than just bots—and help our customers do the same. Kofax RPA is integrated with our broader intelligent automation platform, delivering true digital transformation for your business.

Safe-Guard Products Adjudicates Claims 75% Faster with Kofax TotalAgility

Safe-Guard Products uses Kofax solutions to revolutionize how it manages millions of contracts and thousands of claims, reducing adjudication times by more than 75%, boosting productivity by 30% and improving customer satisfaction by 15%.

Challenge

Every year, Safe-Guard processes more than two million contracts and thousands of claims. Whether a customer is purchasing a product or filing a claim, the company must ensure a prompt response—or risk damaging customer satisfaction and potentially losing valuable business to more agile competitors.

"We're here to help our customers when they need us," said Tim Dewey, Vice President of Operations Technology at Safe-Guard. "To achieve this vision, we need to keep customers informed at every stage of their insurance journey and ensure that their requests are dealt with in a timely, accurate manner."

With its rapid business growth, Safe-Guard recognized a need to move beyond traditionally high-touch, paper-based processes if it was to meet customer expectations for prompt service.

"We sell a large proportion of finance and insurance products through car dealerships, which routinely rely on pen and paper," Dewey said. "Claims processing was a similarly paper-heavy process. In each of those areas we have to collect a significant amount of documentation from external stakeholders and customers. Our administrative teams spent considerable time and effort scanning and processing hardcopy documents, as well as reviewing and sorting email attachments into folders."

Safe-Guard realized that it had a valuable opportunity to transform the sales and claims process into a more efficient, streamlined experience.
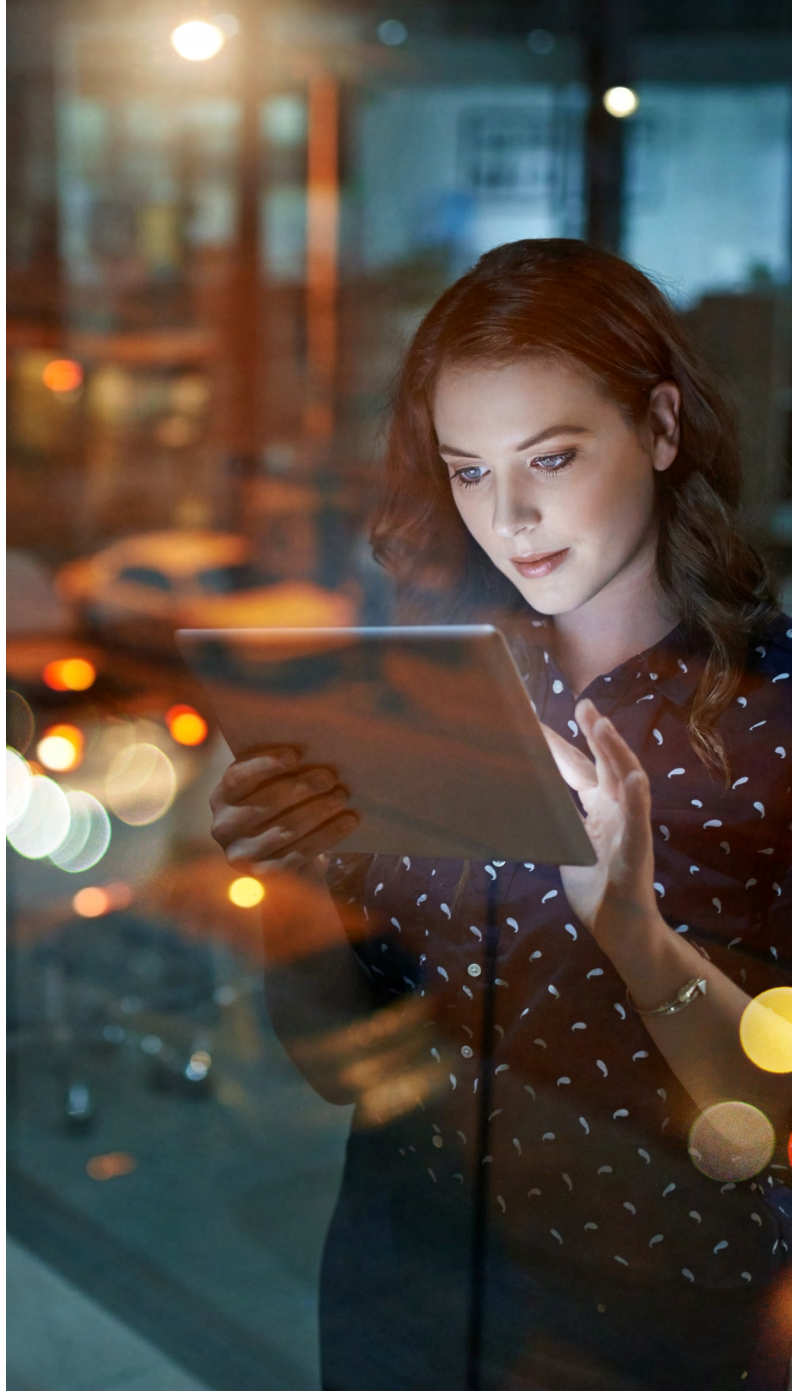
> "Having Kofax RPA automatically scrape information from websites allows us to move the claim through the adjudication process much more efficiently. Kofax RPA is a critical product for us."

Tim Dewey, VP, Operations Technology
Safe-Guard Products

About Safe-Guard
Safe-Guard delivers products to the motor vehicle industry. Its products are sold at more than 10,000 dealerships across North America.

Products
Kofax TotalAgility®
Kofax Analytics for TotalAgility
Kofax RPA™
Kofax Mobile Capture Platform™
Kofax Mobile SDK™
Kofax Transformation™

Focus
Claims Processing
Mobile Capture
BI/Analytics
Customer Engagement
Robotic Process Automation

"We wanted to eliminate any sticking-points in the customer journey that could cause contract and claims requests to be delayed," he added. "The key to achieving this was to reduce the amount of paper and number of touch-points, as well as eliminating redundant process steps. We also wanted to engage more deeply with our customers, keeping them up-to-date throughout the sales and claims lifecycle and providing them with more convenient access to the services they required."

Solution

Safe-Guard selected a suite of document and business process management solutions from Kofax to turn its ambitious vision into reality.

"We recognized that if we could provide greater transparency and efficiency in our initial engagement with a customer, we could deliver a higher-quality experience," Dewey said.

As a first step, Safe-Guard set out to automate the contract and claims submission process and reduce the number of times a single document is handled by an employee. The company automated the capture of paper documents, scanning them directly to a Kofax TotalAgility document management solution without manual intervention. Similarly, documents received by email and fax are also flowed directly through to TotalAgility, producing a single, central information store.

Regardless of how a document enters the system—by mail, fax or email—it is identified by document type and sent to a work queue that matches it to an existing claim or contract. Next, each document goes through an extraction process that identifies and stores any pertinent data.

To deliver a further boost to efficiency, Safe-Guard worked to track each step in the contract and claims handling process to identify areas for improvement, using Kofax Analytics for TotalAgility.

"With Analytics for TotalAgility, we were able to establish key metrics, such as how long each step took, who touched each document and how many times, the number of documents classified in each batch, the average time per classification, and so on," remarked Dewey. "Tracking these metrics provides us with two opportunities: one is to recognize the superstars, and the other is to work with people who aren't as efficient to help improve their performance. With the new insight, we can take steps to improve processing efficiency even further."

Improving the Customer Experience

Beyond optimizing behind-the-scenes processes, SafeGuard is also enhancing the front-end customer experience. Today, it provides customers with regular updates on the status of their pending claim or contract application, along with other communications, including "how can we help" notices—all of which help to keep customers informed and put them at ease.

On the claims side, Safe-Guard is working to launch a web portal that will offer customers up-to-the-minute insight into the status of their claim. They will also be able to view which documents are required to complete a claim and upload them directly. Documents submitted via the web portal will be processed through TotalAgility as if they had been sent through traditional channels.

What's more, Safe-Guard plans to extend this self-service functionality to a range of devices, using a new mobile app built on Kofax Mobile Capture Platform and the Kofax Mobile SDK. With the mobile app, customers will be able to take photographs of claims-related documents using a smartphone or tablet and securely share them with the provider for processing. Safe-Guard anticipates that this will significantly accelerate the claims cycle and empower customers with a more convenient way of submitting claims.

"Kofax Mobile Capture does a lot more than just capture a picture; it reduces the file size, synthesizes the data and brings it all into our system automatically," said Dewey. "With Kofax solutions underpinning our mobile app, we can put new capabilities directly into our customers' hands and help them access the services they need anytime and anywhere—boosting satisfaction and loyalty."

Accelerating the Payment Process

An important step in the claims payment process is evaluation of the claim itself. Before a claim can be paid, Safe-Guard must quantify the value of the customer's loss. That process involves numerous steps. An adjuster reviewed every one of the required 14 claims documents to locate the relevant information and then manually copied and pasted it to a new document. At the same time, the adjuster researched websites such as Kelly Blue Book (KBB) and the National Automobile Dealers Association (NADA) for corresponding information, and again copied and pasted that information into the same new document. This document was then summarized and entered into a contract management site. Safe-Guard employed 20 adjusters who did nothing else but work through this process for every claim.

Many of these manual steps are now automated with the new system. TotalAgility extracts 86 data points from the 14 claims documents, eliminating the need for assessors to manually review them. Safe-Guard then uses Kofax RPA to perform two separate tasks: 1) automatically pull the 86 data points into a centralized document and 2) go out to websites like KBB and NADA and extract any vehicle data and vehicle information related to the claim.

"Having Kofax RPA automatically scrape information from those sites allows us to move the claim through the adjudication process much more efficiently," according to Dewey. "Kofax RPA is a critical product for us."

Kofax RPA validates the amount that should be paid on the claim and then populates the data into a proprietary contract management system—moving it to a payment status and eliminating yet another manual step. The claim is then routed to Safe-Guard's accounting and finance department to print the check. With TotalAgility and Kofax RPA, the process from claim submission to payment is not only faster but more accurate. "I like to say that Kofax RPA makes it all happen 'automagically,'" he said.

Results

The new approach to contract and claims processing has delivered significant benefits. Document capture has been transformed into a fast, low-touch activity, helping SafeGuard handle contract- and claims-related documentation more efficiently than ever before.

"In the past, document capture alone used to take up to two hours a day; now it takes just 10 to 15 minutes. And during this process, documents used to be handled by an operator three to five times. Today, they're touched just once—a reduction of up to 80%."

In addition, Safe-Guard estimates that the new solutions will reduce the time to adjudicate a claim by at least 75%, as Dewey added, "This will help us to accelerate the end-to-end claims lifecycle, from submission to payment. If all the relevant claims documents are submitted to us by 2:00 p.m., we could release and send a check by noon the next business day."

By automating and streamlining processes, Safe-Guard staff can handle growing volumes of work more easily, increasing productivity of the claims processing team by approximately 30%.

The newfound efficiencies have allowed Safe-Guard to run a much leaner team, even as its business continues to grow. At one point, Safe-Guard assigned just under 50 full-time employees to manage the paperwork related to contract and claims processing. They expect to cut that number in half, showing a return on their investment in less than 18 months.

Equally important, the new approach is already having a positive impact on customer service levels. Safe-Guard estimates that it has achieved a 25% reduction in the number of calls from customers checking on the status of their contract or claim, and customer satisfaction scores have increased by 15%.

"The ability to digitize and streamline many aspects of customer interaction, from contract purchase to claims submission and management, will make it that much easier for customers to do business with us. This will help us increase satisfaction and loyalty, and gain a valuable edge on competitors. We consider our investment in Kofax solutions to be a game-changing differentiator in the marketplace," finished Dewey.

AMN Healthcare Uses Automation to Process Healthcare Workers' Timecards and Key Credentials

AMN Healthcare, working with business partner Genus Technologies, uses Kofax RPA™, Kofax TotalAgility™, Kofax Analytics for TotalAgility and Kofax Mobile Capture™ to automatically process healthcare workers' timecards and key credentials. Combined, these solutions ensure that their healthcare workers can fill "high needs" positions and receive their pay on time, while also reducing workload for the company's back-office staff—allowing them to focus on more value-add tasks.

Challenge

Doctors, nurses and healthcare professionals are the everyday heroes that power the US healthcare system. For medical providers, effectively coordinating the schedules of thousands of these professionals is a complex, time- consuming and mission critical activity.

Enter AMN Healthcare: the industry leader in US healthcare staffing. Headquartered in San Diego, California, and with offices across the US, AMN Healthcare operates nationwide to match freelance medical staff to healthcare vacancies, with a special focus on travel nursing.

Jeff Stratton, Senior Project Manager at AMN Healthcare, explained: "We help healthcare professionals find the work they need, whether on a contingent or permanent basis. In fact, a little over half our revenue comes from matching a workforce of around 8,000 travel nurses to 14-week long assignments at healthcare facilities throughout the US. We connect these workers with open hospital vacancies, pay them for their labor, and then bill the hospitals for that labor."

Ensuring that nurses are paid on time is one of the most important and time-intensive activities for AMN Healthcare.

"The risk of lost timecards and missed payments is now almost completely eliminated. With the Kofax solution, we can rely on near-zero errors in our data entry and processing."

Jeff Stratton, Senior Project Manager
AMN Healthcare

About AMN Healthcare

Founded in 1985 and headquartered in San Diego, California, AMN Healthcare provides healthcare staffing solutions for medical facilities across the nation. The company also offers managed services programs and recruitment process outsourcing solutions that enable healthcare providers to reduce complexity, increase efficiency and improve patient outcomes.

Products

Kofax RPA™
Kofax TotalAgility®
Kofax Mobile Capture™
Kofax Analytics for TotalAgility™

Partner

Genus Technologies is a software consulting company that helps organizations overcome the challenges they face automating content and related processes in the digitization of business operations and workforce tasks. Whatever the challenge, Genus makes the complex simple and helps our customers unlock and accelerate digital change.

Focus

Robotic Process Automation
Customer Uptime Improvements

Jeff Stratton said: "The hospitals and medical centers at which our nurses work give them time cards for hours completed, which they then file with us for payment. Once we receive those time cards, we check that the amount earned is correct and make sure our nurses receive their pay on time. This step is critical to keeping operations running smoothly and staff feeling looked-after, but to do this requires heavy-duty data processing.

"We estimated that we were processing around 4,000 of these timecards each week, which amounted to 8,000 hours annually. Over time, we found that the system we used for checking and processing timecards no longer delivered optimum efficiency—with the system prone to human error and occasionally crashing. Because of these inefficiencies, around 200 timecards would go missing each year.

"Lost time cards represent a huge risk for us, as we are liable to provide back payments and could even face legal action. To mitigate these risks, we set out to develop a more efficient way of paying our clinicians in full and on time for the vital work they do."

Solution

AMN Healthcare decided to automate its timecard processing activities using the Kofax RPA™ platform alongside Kofax TotalAgility™, Kofax Analytics for TotalAgility™ and Kofax Mobile Capture™, integrated with AMN Healthcare's inhouse application for timecard filing. Working with its business partner, Genus Technologies, AMN Healthcare was able to radically transform this essential business process.

"Our integrated suite of Kofax solutions has enabled us to revolutionize our timecard processing systems by making them much easier to use," said Jeff Stratton. "To do this, we created a mobile app, which allows our nurses to photograph and upload their timecards, select the type of work they're filing for, and submit a request for payment.

"Submitted timecards then go through our network, where they are processed through our Kofax system quickly and efficiently. These smart software robots determine which type of work is being billed, and then route it through to the appropriate teams for processing. This approach is far more efficient than our previous system and dramatically reduces the risk of human error.

"We use Kofax RPA at the front end of the process to help get our clinicians working in a healthcare delivery system faster. Validating qualifications requires a lot of document verification and processing. We found quick wins with Kofax RPA by automating high-volume process steps. Timeliness and accuracy are now maximized, and our support staff can focus on shoring up other process areas."

But AMN Healthcare may not have been able to realize these benefits so dramatically without the help of its business partner, Genus Technologies. "We initially had some difficulty realizing the potential of

the Kofax platform," said Jeff Stratton. "But once Genus Technologies came on board to help us with the implementation, we were able to complete the project with zero critical production issues. That is nothing short of phenomenal, but it was no surprise to us. Genus Technologies is well known for the professionalism and diligence of its team, and we are proud to have them as our long-term partner for all things Kofax."

AMN Healthcare also mobilizes the analytics capabilities delivered by its Kofax solutions to drill down into the work that contractors have filed previously, build a clearer picture of their needs, and offer them the most relevant opportunities.

"AMN receives timecards continually and managing the production cycle can be a big challenge. We use Kofax Analytics for TotalAgilty to glean insights into that cycle. We have dashboards and reports that allow us to understand the flow of documents and to set priorities for the support teams. We have a much better understanding today of where timecards are coming from, when we're receiving them, and where they are in the process than we did in years past. This has been a significant transformation for the shared services group."

Results

After adopting RPA solutions from Kofax, AMN Healthcare has significantly reduced the amount of time spent processing contractors' timecards, while also reducing the risk of error.

"Since adopting Kofax solutions, we have reduced the time spent processing timecards by up to 68%, cutting the number of man hours required to complete this task from 8,000 to just 2,600," said Jeff Stratton. "This frees our staff to focus on more value-add tasks and reduces the need for them to work overtime to file administration, generating a knock-on quality of life improvement for some of the busiest workers in our country."

AMN Healthcare has also gained a greater understanding of its clinicians' data thanks to the Kofax solution.

"The risk of duplicating data is now much lower, because the software robots embedded in the Kofax solutions spot and resolve mistakes automatically," said Jeff Stratton. "The risk of lost timecards and missed payments is now almost completely eliminated, which is great for our contractors as it ensures they get paid on time. With the Kofax solution, we can rely on near-zero errors in our data entry and processing, which creates peace of mind both for us and for our contractors."

Jeff Stratton concluded: "We have experienced 100% system uptime since adopting the Kofax solution, and the response from our internal staff has been very enthusiastic as a result. Thanks to Kofax RPA, as well as the top-notch support of Genus Technologies, we can now easily direct our staff to better opportunities, and more efficiently too—helping them maintain a steady record of employment and encouraging them to keep working with us to deliver life changing healthcare services."

Global Telco Provider Switches to a Faster, More Efficient Approach to Invoicing

This telecommunications provider moved to a fully digital mailroom, and harnessed Kofax RPA™ to power fast, accurate electronic invoice processing. The new approach supercharged productivity by up to 400%, helping the company pay bills faster and reduce late payment penalties.

Challenge

Paying bills is hardly the most enjoyable task, but it's one that just has to be done—whether you're a private individual or a big business. For this telecommunications provider, getting the bills paid on time is a top priority. But with hundreds of suppliers and partners to reimburse, including demanding utilities companies and government agencies, staying on top of accounts payable (AP) workload posed a tough challenge.

The company's Director of Accounts Payable Shared Services explained, "We receive upwards of 1,000 mail items every day in AP, most of it invoice-related. In the past, people had to open and sort through all of those items, then pass the invoices on to another team for validation. Finally, staff would have to key the invoice data into our finance systems manually so that the bills could be processed and paid.

"It typically took us 14 days on average to process a single bill. As many of our suppliers have 20- or 25-day payment terms, delays meant that we would incur a 2% or 3% late fee on a large portion of bills."

He continued: "What's more, some suppliers will cut off services if payments fail to reach them in time. If the electricity or water were to be cut off at one of our offices, the consequences would be severe: our staff would be unable to do their jobs and our customers

"In the past it took us an average of 14 days or more to process an invoice; we can now turn around invoices in just a day or two."

Director, Accounts Payable Shared Services
Global Telco Provider

About the Company
This global telecommunications provider operates a large broadcasting and cable television network, and offers internet and telephone services.

Products
Kofax RPA™
Kofax Capture™
Kofax Transformation™

Focus
Accounts Payable Automation
Digital Transformation
Financial Process Automation
Robotic Process Automation (RPA)

could be left without service. We couldn't afford for inefficient manual processes to hold us back from getting bills paid in a timely manner, so we set out to streamline AP operations."

Solution

As a first step, this telecommunications provider implemented Kofax Capture™ and Kofax Transformation™ solutions to extract key information from vendor invoices automatically and integrate the newly digitized content with its back-end finance systems.

"We achieved remarkable efficiency gains by moving from manual data entry to optical character recognition processing with Kofax software," recalled the AP Shared Services Director. "Productivity per person rose by approximately 200%, and we were able to reduce the number of FTEs involved in processing invoices by 50%. As we were handling invoices faster and more accurately, we were also able to shorten time-to-payment—thus reducing the risk of late penalties and disruption to services."

Enhancing document capture and processing was just the first step on a far-reaching digital transformation journey. The company plans to create a fully digital mailroom, and recently introduced Kofax RPA™ software to enable this objective.

A powerful, market-leading robotic process automation platform, Kofax RPA provides this company with a fast and efficient way of automating a wide range of repetitive tasks and processing information from a multitude of applications and data sources, where software robots interact with applications, trigger responses, and communicate with systems and employees.

Kofax RPA has been the catalyst to move from paper to electronic billing, enabling the telecommunications provider to take advantage of online bill payment facilities offered by a number of government agencies and utilities companies. Using Kofax RPA, the company has built dozens of robots that automatically retrieve invoices from online portals and deliver the information to finance systems, ready for processing and payment.

The AP Shared Services Director said, "We evaluated several robotic process automation solutions and we felt that Kofax RPA best matched our requirements. There were a few smaller-scale products that just weren't robust enough for our needs; they felt more like a set of components that had been strung together rather than a fully established solution. We also considered some professional service-based solutions from larger-scale outfits, but these providers wanted to come in and configure their tools for us, which meant that we would have very little control over the development and maintenance of the software ourselves.

"What set Kofax RPA apart was that it offered the best balance of an enterprise-grade product backed by professional support, which we could take ownership of ourselves—and with fewer IT resources than many competing solutions."

Today, the company uses Kofax RPA to retrieve around 9,000 invoices a month from 30 vendor websites and developed a dedicated Kofax RPA robot for each of these vendor sites.

The AP Shared Services Director explained, "The Kofax RPA robots go out to the web and bring back all the invoices automatically. The software then inserts the data into an interface table, where it goes through a series of checks and validations to make sure it's all correct and complete. Once the invoice data is validated,

it runs right into our finance system. It's a completely digitized, touchless process, and it's much faster and more accurate than scanning paper invoices."

The telecommunications provider continues to use Kofax Capture and Kofax Transformation to help process its paper-based invoices—but its ultimate goal is to eliminate paper billing entirely, and completely transform the entire process to digital, powered by Kofax RPA.

"We are steadily expanding our web data extraction work, and ultimately plan to cover more than 100 vendor sites, using Kofax RPA to retrieve more than 15,000 invoices every month," noted the AP Shared Services Director. "Our use of Kofax RPA is now really taking off, and we expect to achieve a full return on our investment within just twelve months of our original implementation."

Results

This telecommunications provider has set its sights for robotic process automation much higher than just the AP department. The company is gradually working to extend Kofax RPA to other areas of the business, including its customer service division. Here, it has developed a Kofax RPA robot that reviews open support cases, then categorizes them and assigns them to teams—saving staff valuable time and effort.

The AP Shared Services Director stated, "We receive hundreds of support cases every day via email. In the past, a staff member would have to read through all of these emails, determine what the issue was, and route the case to the appropriate customer service team or individual agent. Today, we've developed a Kofax RPA robot that uses pre-determined business rules to categorize support cases and route them to the relevant team for resolution.

"Now that we have Kofax RPA handling this work up-front, our customer service agents no longer have to waste time reviewing emails and can focus on addressing the support cases, which is helping us to deliver more responsive customer service."

With the introduction of Kofax RPA, the company is well on the way to achieving its goal of a fully digital

mailroom, helping AP teams work more productively and driving down costs. "With the addition of Kofax RPA, we have digitized close to 95% of AP operations, and we are on track to go fully electronic by the end of 2017," said the AP Shared Services Director. "The increased digitization and automation have delivered another big boost to efficiency—we estimate that productivity per person has increased by as much as 400% with Kofax RPA. We have been able to reallocate three FTEs from invoice processing to other areas, and we currently run with a team of just five people, which is helping us to keep operating costs low."

Thanks to the efficiency gains delivered by Kofax RPA, the telecommunications provider has been able to reduce invoice processing times dramatically. As a result, the company can make sure it pays invoices within term, keeping suppliers satisfied and reducing the number of late payment penalties.

The AP Shared Services Director confirmed, "Whereas in the past it took us an average of 14 days or more to process an invoice, we can now turn around invoices in just a day or two. Similarly, we have accelerated check cashing by an average of eight to nine days. This has considerably reduced instances of late payments, helping us to avoid hundreds of thousands of dollars in penalties and to keep operations running smoothly around the clock."

He concluded, "This is just the beginning for us—we have big digital transformation plans, and I see Kofax RPA as a great enabler for where we want to take the company in terms of digitizing processes. We've been breaking new ground with this solution and we look forward to extending the benefits to more of the business in the future."

Automation Helps Delta Dental of Colorado Improve Service Responsiveness and Compliance

Delta Dental of Colorado has gone digital, moving from paper-driven processes to electronic content and workflows, using Kofax solutions to manage and track documents throughout their entire lifecycle. Today, the company has shortened turnaround times for key processes from weeks to days, and can deliver a more responsive service to providers and customers—all while facilitating regulatory compliance.

Challenge

Today's consumers demand faster, more efficient services, insurers must race to keep up. Companies that fail to meet ever-increasing expectations risk damaging customer satisfaction and losing valuable business to more agile competitors.

These are challenges that Delta Dental of Colorado knows well. With teams inundated with large volumes of paper files, tracking the progress of individual documents was a difficult task. The result? Delays that drove up operating costs and threatened to damage the company's relationship with providers and customers.

Heather Magic, Director of Group and Individual Administration at Delta Dental of Colorado, explains: "Every day, we exchange a huge amount of information with our dental providers and customers, concerning applications, renewals, policy updates, and more. In the past, it was difficult for teams to access and process this documentation efficiently. A lack of visibility and control over content meant that files often got lost in the shuffle, and could take days or even weeks to be processed.

"For the first time, we can say that we have total control and visibility of content as it moves through our business, and the ability to work with information in a much more accurate and efficient way."

Heather Magic, Director of Group and Individual Administration
Delta Dental of Colorado

About Delta Dental

Established in 1958, Delta Dental of Colorado is the state's leading dental benefits company, serving more than one million members with high-quality, cost-effective dental plans. A non-profit organization, Delta Dental of Colorado's mission is to improve the oral health of the communities it serves.

Products

Kofax TotalAgility®
Kofax Capture™
Kofax Insight™
Kofax RPA™
Kofax Transformation™

Focus

Customer onboarding
Case management

Partner

Tromba Technologies

"Additionally, as an insurer, we are required to retain certain documents for up to 10 years—and be able to retrieve them at a moment's notice in the event of an audit. Relying on paper made it difficult to respond to audit requests in a timely manner. In some cases, we were unable to locate specific documents, which exposed us to the risk of costly penalties."

Delta Dental of Colorado recognized that there was an urgent need to adopt a more strategic approach to managing enterprise content. With a better view of information and a deeper understanding of the status of individual documents, teams would be able to handle a higher volume of work more efficiently and deliver a more responsive service to providers and customers—all while ensuring regulatory compliance.

Solution

Delta Dental of Colorado has embarked on an ambitious effort to replace paper-driven processes with electronic content and workflows. The company is taking control of the end-to-end document lifecycle,

using Kofax solutions to capture and manage content from the moment it is received, and seamlessly integrate it with existing business processes.

Heather Magic comments: "Today, content management begins and ends with Kofax solutions. For example, when a new dental provider applies to join our network, we can automatically classify and extract the information we need from their application form and supporting documentation, and feed the necessary digital content into our business applications and workflows."

Additionally, Delta Dental of Colorado takes advantage of Kofax Insight™ to link data and metrics to steps in business processes, gaining timely, accurate insight into operations. The company obtains a deeper understanding of how processes are working, helping it to remove bottlenecks and improve efficiency.

Heather Magic says: "For the first time, we can track data and processes across the entire document lifecycle, and have access to a host of dashboards and metrics. This allows us to pinpoint where a particular work item is at any given time, which user has been working on it, and for how long.

"With Kofax solutions, we can make informed, data-driven decisions about how we manage our processes and people. The result is that people are more accountable for the work they are doing, and can achieve more in shorter turnaround times."

Strong Partnership Delivers Real Results

From the very start, Delta Dental worked with business partner Tromba Technologies to ensure that the Kofax solutions were expertly configured and deployed.

Heather Magic remarks: "We have a great working relationship with Tromba—they are the reason why this project has been so successful. The entire team has been fantastic at working with us to understand our business and tailor the Kofax solutions to meet our unique needs."

Delta Dental of Colorado kicked off its Kofax implementation in 2013, and has been working consistently to extend the solutions to cover more processes and functional areas.

Heather Magic states: "Working with Tromba, we have hit almost every single deadline we have set for ourselves. For 2015, we set a goal of completing six new projects—which our executive team felt was almost impossible—and are on track to have everything implemented before year-end."

With the Kofax solutions, Delta Dental of Colorado has been able to reap a rapid return on its investment, as Heather Magic explains: "At the outset, we estimated that it would take between four and six months before we achieved a return on investment (ROI) for individual projects. In reality, we have been seeing a ROI as early as one to two months for certain projects. And taking the entire Kofax implementation into account, we have achieved a ROI within six months, which is phenomenal.

Results

Today, Delta Dental of Colorado is empowering teams with newfound control over information and processes, helping them manage growing volumes of work more effectively.

Heather Magic gives an example: "When new providers apply to join our network we have to carry out a rigorous series of checks to verify that they have the proper credentials and that the information provided in their application is accurate. Each application can span up to 26 pages, and contain more than three dozen fields.

"What's more, we are required to regularly re-validate dentists' credentials. We used to do this every five years, but recent regulations have changed this to every three years. This caused a huge spike in workload, and staff were finding it difficult to keep up.

"Previously, a team of two people—and a temporary staff member—spent hours checking each application or renewal manually. They would have to pull data from the application and go out to a number of different websites to verify that the information provided was up-to-date and accurate."

She continues: "Today, we've streamlined the data-gathering and verification process with Kofax (RPA capabilities). All the necessary information is automatically captured from the web and put into the relevant workflows for our operators to review and

approve. This has massively reduced workload for the team, so two people can now process all of the work items without the need for help from a temporary worker. Not only has this delivered considerable cost savings, it helps us to ensure that provider applications and renewals are processed in a timely manner, keeping our partners satisfied."

Reducing Risk, Boosting Responsiveness

Introducing a centralized electronic document repository and flexible case management capabilities has enabled faster, more reliable access to information.

Heather Magic states: "Teams can access information online in seconds, which helps them deliver a much more responsive service to customers and providers. Improved document traceability also means that Delta Dental of Colorado can respond to audit requests in a more timely, consistent manner—reducing business risk."

Greater levels of agility and insight are helping Delta Dental of Colorado to lift its customer services to new heights, driving continued growth of its provider network and customer base.

Heather Magic concludes: "Kofax solutions have made Delta Dental of Colorado much more agile. They are really helping us to blow our competitors out of the water when it comes to turnaround times in particular. Whereas in the past, it could take weeks to respond to applications and other requests, we can now get back to customers and providers in just a few days.

"We have been incredibly impressed with the Kofax solutions—they have transformed the way we work. For the first time, we can say that we have total control and visibility of content as it moves through our business, and the ability to work with information in a much more accurate and efficient way. We are excited to continue working with Tromba to explore new ways to use the Kofax solutions to help our teams work more productively and deliver an even higher level of service."

Next Steps

Experience the world's most complete automation software.

For more information about Kofax RPA, contact us at **info@kofax.com** or give us a call at: **+1 949.783.1333**

www.kofax.com

WORK LiKE TOMORROW.™

KOFAX