



Document automation

The key to more efficient document creation

Introduction

In almost all areas of a company, documents of various types are created on a regular basis. Again and again, the structure of these documents follows similar patterns; building them manually becomes a time-consuming Sisyphean task.

Documents must not contain any errors to avoid serious consequences. But finding and fixing them is exhausting, inefficient, and redundant. A lot of information is copied and pasted from old documents or other systems, often migrating errors from one document to another. Monotonous repetitive editing is a productivity problem and documents are often “brittle”, lacking resilience to adapt automatically to different use cases.

Document automation simplifies document generation — creating, editing, formatting, and importing relevant information from other sources.



Table of Contents

Document automation — overview	4
What is document automation and how is it used?	5
How does document automation work?	6
How and where is document automation used in companies?	7
The top five advantages of document automation	8
Document automation challenges	9
Document automation in use	10
Sales	11
HR	12
Product marketing	13
Finance	14
Document automation software selection criteria	15
empower® Document Automation	16
How to setup your document automation	17
Sales proposal automation	18
Product presentation automation	19
Dynamic document templating	20
empower® Document Automation integrates them all	21
Document automation as an opportunity	22

Document automation *Overview*



What is document automation and how is it used?

Document Automation or automated document creation describes the process of systematically using pre-programmed structures to build documents quickly. It frees employees from repetitive, inefficient, and error-prone tasks. Automated document creation delivers a significant reduction in workload and improvement in quality for most companies. Automation can replace manual document creation in almost all scenarios. It is an essential tool to increase efficiency and ensure consistency in corporate communications.

There are two types of document automation:

1. Automation of incoming documents

Sometimes companies automatically extract data from incoming documents to save in their databases or route documents through workflows. Automation scans the document for relevant information, checks its validity, and saves the data and document appropriately. This kind of automation minimizes the effort to ingest new data and avoids risk of mistakes inherent in manual input.

2. Automation of documents to be created

Creating new documents from templates accelerates document production, provided that the templates are properly structured and formatted. Templates can even include links to other systems to import up-to-date data automatically, saving effort and errors finding data and manually incorporating it.

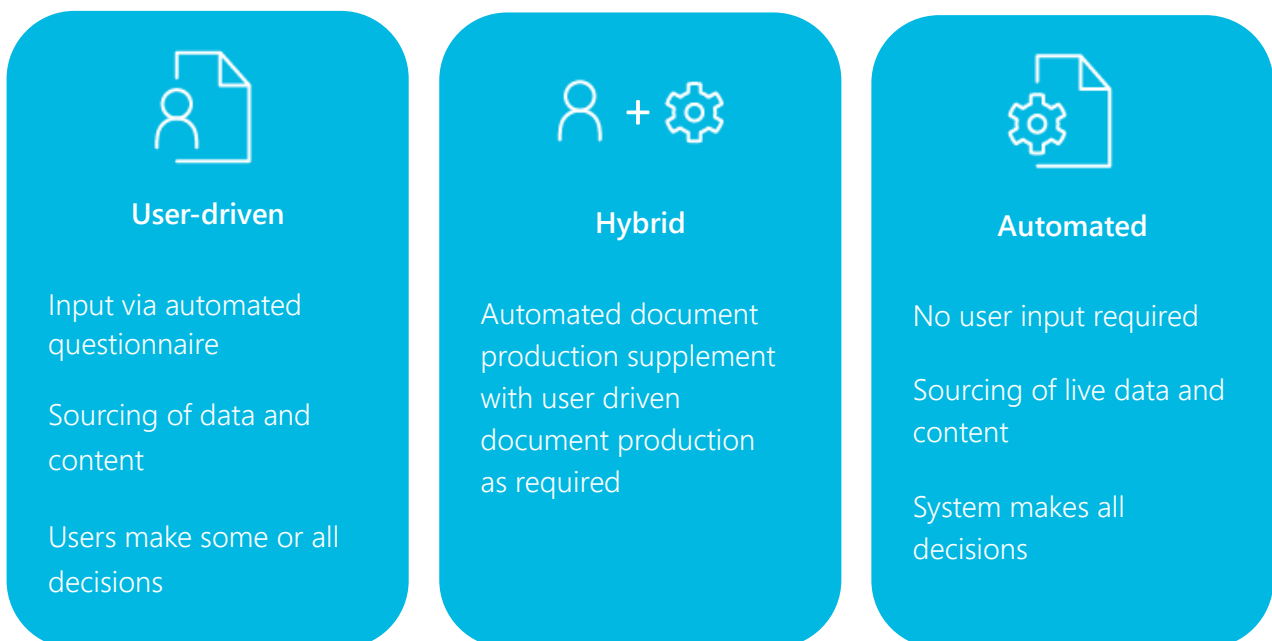
Document automation is often understood to refer exclusively to the second type of document creation. For this reason, we will focus solely on this aspect in this whitepaper.

How does document automation work?

Almost all documents can be automated to some degree. Typically, however, automation is particularly worthwhile for frequently used document types that require a certain degree of customization. When choosing documents to automate, it is a good idea to focus first on those where most time is lost in creation - be it due to high volume or high complexity - and for which the specifications are already clear, so that template creation is particularly easy.

Document automation needs data to insert. To do this, the relevant information is collected from various sources and automatically inserted into predefined places in the document. This can be a form a user fills out or a questionnaire or wizard, programming that compiles existing data or text, and can also include graphics, tables, or images. Often no human intervention is required, only a quality check of the end result is sufficient.

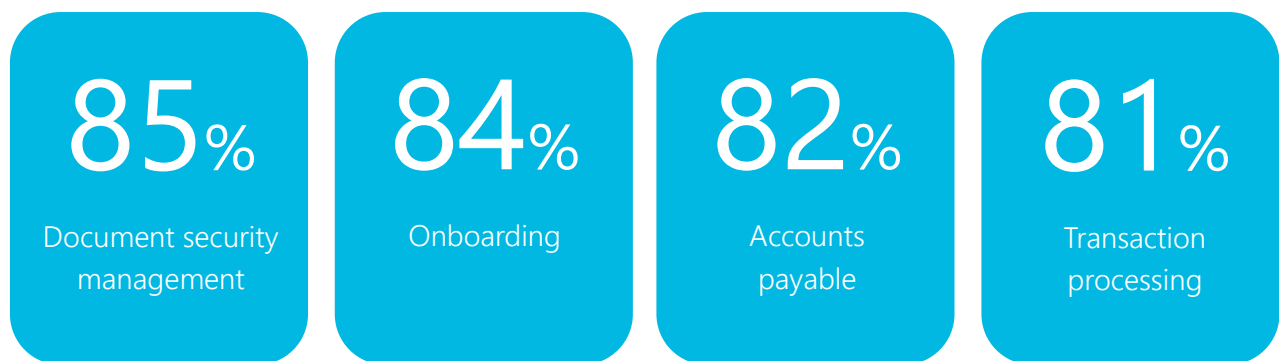
There are three types of document automation — fully automated, user-driven, and hybrid:



Formatting is also automated in accordance with format specifications. For example, document automation handles document page setup and content formatting based on predefined, flexible templates. It eliminates redundant steps in the document setup process. Companies save on document creation time and the error burden is reduced to almost zero.

How and where is document automation used in companies?

Document automation can be used wherever documents are regularly created, regardless of department or industry. According to the Kofax Benchmark Study 2022, the following processes, among others, are at the top of the automation list at German companies:



Studies by Nielsen show that creation and formatting of documents accounts for up to 40% of working time. In addition, manually inputting data over and over again increases stress and risk. Document automation allows you to create documents much faster.

When creating complex documents like offers, product overviews, reports, or presentations, department-specific content often must be gathered and prepared according to a recurring schema. Carrying out each step individually by hand is a tedious, stressful, and time-consuming process that often leads to errors.

An automated template with links to other data sources allows specific product and customer information to be inserted easily and with no extra formatting work. People do not need to waste time searching through old documents to cannibalize or repurpose, or create the same content repeatedly. Global changes are easier to implement. If metadata, content, details or even legal principles change, manual adaptation is tedious and error prone. Automated documents can implement these changes in the shortest possible time and keep all files up to date. Since document automation software can be integrated into existing systems such as DAM, CRM, PIM or ERP systems, changeovers and long familiarization periods are avoided.

Example: ABUS Security Tech Germany saves 100 hours annually in the creation and updating of numerous product presentations. They reduced the amount of work involved in creating presentations to a minimum with the empower® Document Automation solution.

The top five advantages of document automation

Consistency

This includes adherence to corporate design and style guidelines. Since employees are spared the manual formatting involved in creating documents, uniformity becomes less costly and more reliable. Preformatted templates ensure that document appearance conforms to the company's exact design specifications and is not subject to arbitrary decisions or whims of individual employees. It also frees up staff time and capacity to focus on their core responsibilities.

Compliance

Adhering to all legal and company regulations is often a critical problem. Document automation reduces risk of errors, as templates can be aligned to comply with all relevant requirements, whether legal or self-imposed.

Minimize risk

Automation reduces the risk of erroneous information from manual mistakes. Loss of profit, legal consequences, or deterrence of potential customers are far less likely and confidence in the company increases.

Efficiency

Automating repetitive data entry and formatting frees up time for employees to focus on other more important tasks. That can generate additional positive benefits like greater motivation and job satisfaction, since unstimulating work is reduced to a minimum.

Flexibility

Market conditions, legal regulations, or internal company requirements can change quickly. Document automation makes it possible to flexibly incorporate any changes into templates without having to tediously adjust each individual document. This results in much greater flexibility in the design and implementation of innovations, and a company can react dynamically to any changes.

Document automation challenges

As helpful as automated document creation is, there are some issues you should consider when planning and implementing it:

Customizability

Content that is inserted into the automated documents must be correct and appropriate for each individual case. Company-specific needs must be easily and quickly embedded and still meet individual requirements and specifications.

Flexibility

Updates to templates should ideally apply to all documents that have already been created based on those templates. Changes to templates must be easy so the company can respond adequately to changing business requirements without getting bogged down in complicated updating and conversion processes.

Compatibility

Document automation must be compatible with existing software and fit into a company's existing digital infrastructure. Ideally, it integrates with other business systems such as SAP, Salesforce, PIM and CRM systems, saving the need to switch between applications.

Usability

Document automation software must be easy and efficient to use. It should be self-explanatory, without the need for numerous training sessions and the tool slowing down users in their daily tasks.

Cost

Whether it is a one-time payment, a fixed monthly subscription system, or depending on the amount of usage, there are different payment options for document automation software.

Hosting

Who hosts the software is an important decision factor. Would you prefer to manage the document automation system on premise, or host in a cloud service, possibly by the vendor?

Document automation in use



Sales

Every day, salespeople create quotations, product overviews, and presentations and send them to customers. This takes a lot of time and requires many steps that they repeat every time. The more complex and multi-layered the offers become, the more difficult it becomes to create compliant documents. For each offer, they must perform numerous formatting steps to adapt the document or presentation to each specific situation. Often, required content is not readily available and entails an extensive search. These steps take concentration and effort that could be better spent elsewhere.

One popular tool designed to simplify acquisition and sales management is Salesforce, especially for managing and analyzing customer and sales data. However, Salesforce does not affect time involved in creating proposals or offer presentations in Word or PowerPoint. Short overviews or quick proposals in Microsoft Office can take a disproportionate amount of time to create.

Document automation can shorten and largely automate these processes. Sales proposal automation enables generating proposals within Salesforce itself. The offer can be personalized with just a few clicks. Assets and frequently used content are at your fingertips without having to switch systems, and automatically insert themselves with the correct format. Customer- and product-specific information is directly available. Sales proposal automation saves time and reduces the risk of errors by eliminating the need to copy content together.

Salesforce automated document assembly can generate any sales document, not just proposals. For example, contracts and sales brochures can also be assembled automatically. Based on parameters selected by the sales employee, the document is assembled according to the same predefined scheme. This eliminates the need to train employees on correct formatting and composition and ensures that the right content is always used in the appropriate format.

According to an opinion poll conducted by Kofax, 87% of German business owners say that automated processes increase employee productivity and satisfaction. 74% also say that one goal of automation is to make back-office operations more efficient.

Seven.One Media uses the empower® Document Automation solution to automatically assemble offer presentations within Salesforce, saving almost 15 minutes per offer presentation. This results in a return on investment of 300% for the company.

Document automation in sales

- ✓ Automates formatting and assembling steps for documents like product presentations and offers
- ✓ Allows efficient template edits and updates
- ✓ Simplifies finding and incorporating relevant information
- ✓ Minimizes errors and improves document quality
- ✓ Saves time and effort

HR

Human resources deals with people: personnel planning, recruiting, employee support, employer branding development, and more. Most HR departments also spend a lot of time on document creation: onboarding documents, job postings, performance reviews, contracts, and many other legally binding documents cross HR's desk. Given the sensitivity of HR's responsibilities, mistakes are not only annoying but they can also develop into serious problems.

Dynamic document template solutions enable faster creation of documents across the HR spectrum, whether contracts, performance reviews, and even emails. Automation eliminates the need to collect and copy content, gaining time for more important work. Especially important from a legal point of view, automation reduces human errors and improves security. It also helps with change management. If laws or internal company requirements change, automated documents can be updated without much effort, avoiding the stress and risk of manual updates in each individual document.

SAP is a common system in HR. This human capital management (HCM) software combines many work workflows and organically integrates HR into the company's processes. The right document creation software can enhance the benefits of SAP by automatically incorporating SAP data into the documents HR creates.

Document automation in HR

- ✓ Faster compilation of contracts, performance reports, mails, and many other documents
- ✓ Reduced transcription and clerical errors and fewer risks with legally relevant documents
- ✓ Adaptability and automatic updates ensure ongoing compliance
- ✓ Efficient data re-use by automatically incorporating content from organized databases
- ✓ Consolidation of many time-consuming steps into one short process

Product marketing

Marketing needs to respond to numerous factors that constantly change. Document creation must not hinder that work; it should instead enable flexibility. To ensure that marketing provides sales and product trainers with the right documents and that products are optimally presented and marketed, employees must be able to work time-efficiently when creating documents, and also be able to react easily to special requirements.

Document automation does not just create new documents. It can also incorporate regular product updates into product presentations or brochures. Of course, for document automation to work optimally, all relevant information must be clearly organized and easily accessible.

Product information management (PIM) systems organize and manage product information, and make it available for use in various channels. PIMs ensure consistency of product data. However, PIMs are now used not just to aggregate product data, but also to manage customer data, orders, reviews, and other product-related information. They often serve as the data source for product presentation automation, which automatically creates and updates presentations as soon as product information in the PIM changes. Employees do not have to adjust numerous product presentations manually.

Together, PIMs and document automation improve efficiency and customer satisfaction by quickly compiling relevant information and consistent product presentations.

Document automation in product marketing

- ✓ More time for tasks beyond formatting and content search
- ✓ Automated data capture and product updates for greater efficiency
- ✓ Integrated document automation and PIM systems for optimal management and consistency in product documents
- ✓ Enables a "single version of the truth" – always up to date
- ✓ Enhanced responsiveness to business dynamics through more efficient work processes
- ✓ Optimized collaboration between sales and marketing

Finance

Document creation in finance departments is highly data- and number-based. Mistakes in transcription can result in gross miscalculations and misstatements. Accuracy is essential. Financial planning, profitability calculations, and requirement plans must be just as accurate as financial controlling, monitoring of operational cash flows, and maintenance of the business plan. When answering a company's most relevant financial questions falls behind due to tedious document creation, the company's efficiency and resilience suffer.

Document automation minimizes the amount of work involved in creating new financial documents, including complex diagrams, freeing capacity for more important content-related questions. Entering financial figures more easily or even automatically avoids clerical errors and careless mistakes which are annoying at best – and at worst falsely influence decision-supporting figures.

Reporting highlights the challenges in everyday finance work. A Europe-wide survey by Deloitte found that only 24% of time is spent analyzing reports and taking the necessary action. Too much time is wasted on low value activities such as producing report documents. Not having time to analyze reports reduces the ability of the finance department to provide valuable insights to the business.

Instead of recreating or laboriously updating each report along with tables and charts following a similar pattern each time, document automation streamlines filling in pre-programmed templates with just a few clicks. This makes the nerve-racking tasks in reporting a brief sideshow and allows people to focus on the crucial meaning of the report.

Automated processes can also be used to create invoices more efficiently. According to the 2020 Level Research Accounts Payables Survey, manual data entry and inefficient processes are the biggest challenge (51% of respondents) in accounts payable. Creating invoices automatically enables processing them without much effort. The laborious process of gathering invoice and product details is done by machine and can be accessed and merged at will. Data from other systems that is automatically inserted into documents no longer needs to be manually entered in lists, tables, or Excel spreadsheets.

Document automation in Finance

- ✓ Automatic creation of complex, recurring reports
- ✓ Processing and linking of various data sets from Excel, among others
- ✓ Charts and tables created faster thanks to automated data visualization
- ✓ Updates with just a few clicks
- ✓ Minimized risk of clerical and transcription errors

Document automation software selection criteria

When deciding on document automation software, you should ask several questions to verify the suitability of new software.

Compatibility

Will the software integrate with my existing software solutions (such as CRM, PIM, ERP systems, or SharePoint)?

Flexibility

Can templates and automated processes be set up and customized according to my corporate design guidelines and business requirements?

Data formats

What other systems can it integrate with and what file format(s) can the finished documents saved as?

Updateability

Can changes to templates be made easily?





empower[®] Document Automation



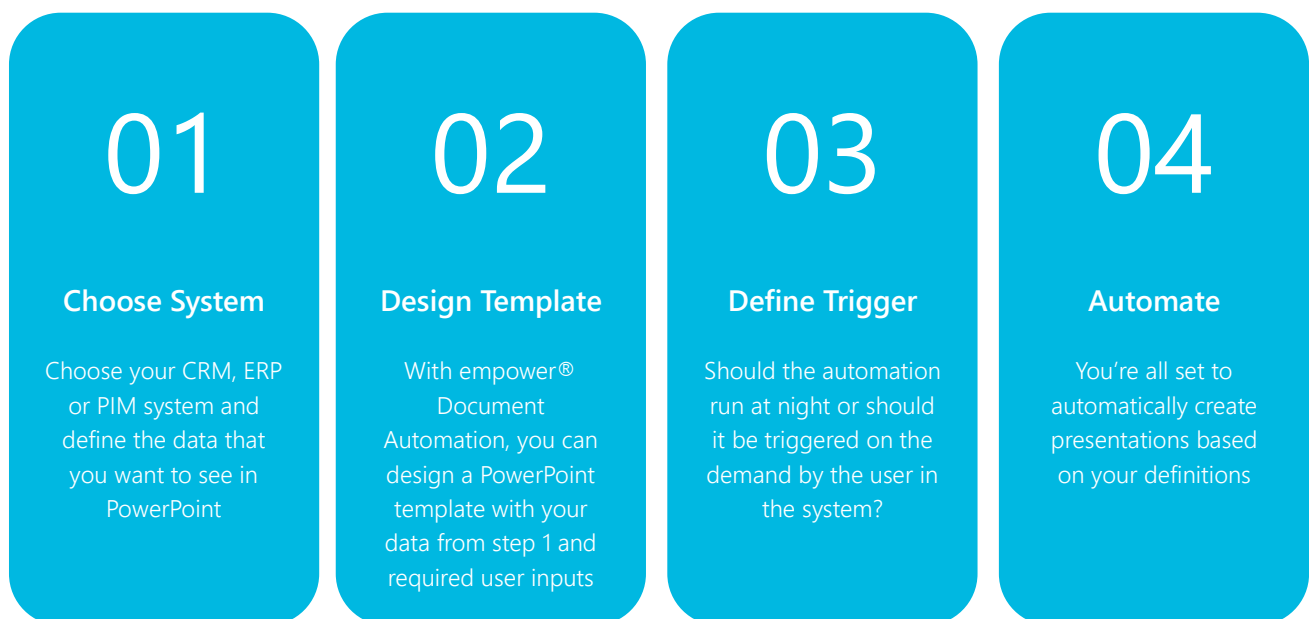


empower® has made it its business to master the challenges of document creation. Our solution for automated document creation in PowerPoint and Word delivers efficient, simple workflows that produce consistent documents adapted to the individual needs of your company.

empower® Document Automation eliminates inefficiencies in document creation processes while saving time and preventing errors.

Unlike other document automation software, empower® Document Automation is compatible with all systems via REST API and integrates directly into existing applications. Even complicated business requirements can easily be met because we can develop custom extensions on demand. By default, empower® Document Automation follows a user-driven automation approach. But hybrid and fully automated solutions are also possible.

How to setup your document automation



empower® Document Automation provides flexible, limitless solutions for document automation in different business areas. For example, proposal automation for sales, product presentation automation for product marketing, and dynamic templating for various purposes. We look at these three examples in more detail below.

Sales proposal automation

Proposals can be created automatically with empower® Document Automation directly in your CRM. They are compiled based on all relevant data and include prices and appropriate product details for a customer-specific offer.

Finding the right content for a proposal presentation from scratch is one of the biggest inefficiencies in document creation. Tedious searches for relevant slides or other content are no longer a problem with empower® driving sales proposal automation. The content for the proposal is gathered and inserted automatically in the correct format. This eliminates formatting steps and ensures compliance with all design specifications. By specifying just a few parameters, empower® Document Automation generates complete sales proposals that comply with corporate design and all formalities for each specific case.

With ProSieben, SAT.1, and Kabel Eins, Seven.One Media markets some of the best-known brands in the German media world. Thanks to empower® Document Automation the Seven.One Media team has more time for what really matters. Each year, the company sends out more than 10,000 offer presentations using Salesforce and PowerPoint. Thanks to empower®, people do not need to switch between the two programs and can create design-compliant offer presentations directly within Salesforce with just a few clicks. As a result, documents are sent out quickly and the media company saves 15 minutes per quote presentation.



"By avoiding a system break in the sales process, we significantly increase the active sales time of our sales staff."

Lennart Harendza,
Managing Director Seven.One Media GmbH

Product presentation automation

Presentations and brochures, such as those used to introduce a product, can take a long time to create. And 37% of PowerPoint working time is spent formatting slides. These tasks are almost completely automated with empower® Document Automation. empower® automatically manages and updates supporting documentation for thousands of products managed in PIM systems, like marketing materials in the form of PowerPoint and Word files for sales and training teams.

Security solutions multinational ABUS faced the challenge of managing their product branding in presentations. They faced the challenge of keeping all presentations up to date and always providing all employees with access to current presentation versions. To minimize the effort, ABUS implemented empower® Document Automation.

With the empower® Library, all presentations are centrally available and managed. The latest versions are always instantly available, directly in PowerPoint. Changes can be made directly and transferred across the company automatically. empower®'s integration with the ABUS PIM system enables synchronization with the empower® Library. News and updates in the PIM system propagate throughout the empower® Library so all documentation is kept up to date. Thanks to empower® Document Automation, ABUS saves over 100 hours in presentation work per year.



"With the empower® PIM interface, we almost completely avoid the enormous manual effort required to create and update the numerous product presentations."

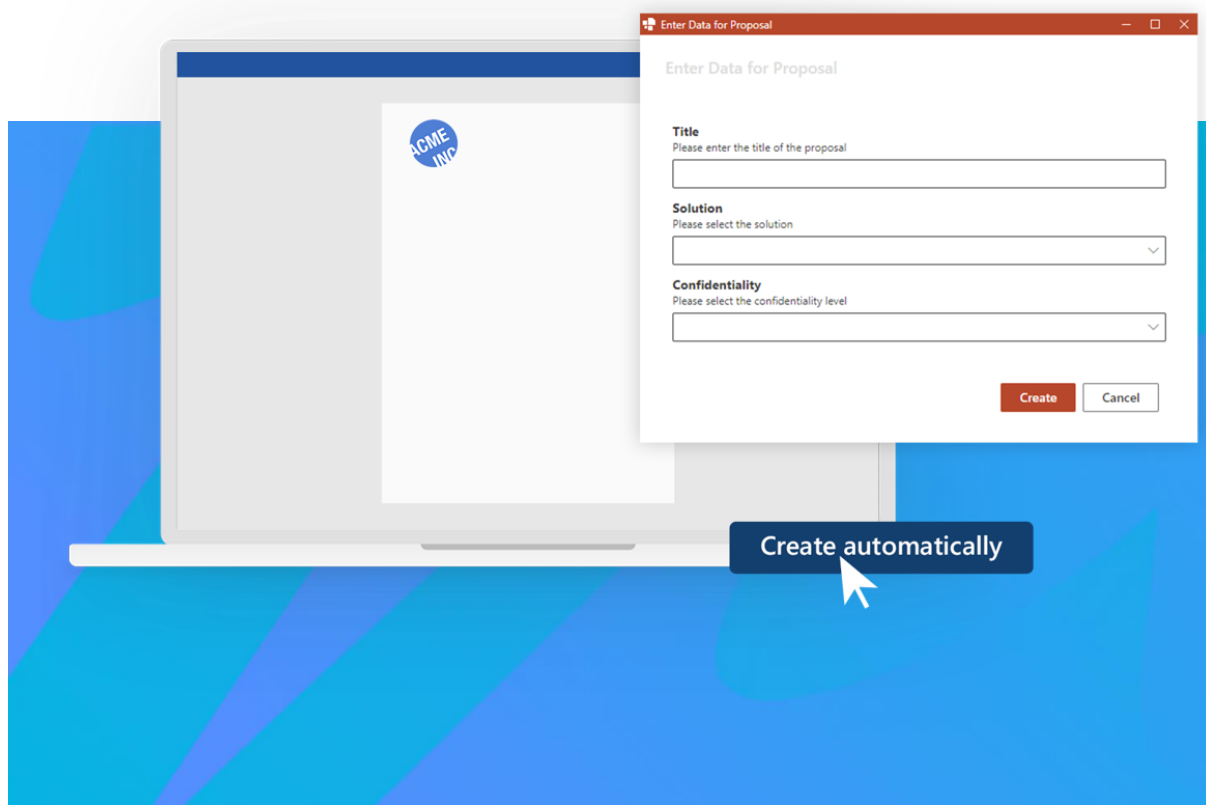
Torsten Mühlhoff,
Corporate Projects, ABUS



Dynamic document templating

With dynamic document templating, any document can be created automatically and quickly based on predefined templates that adjust themselves depending on data and user interactions. Each template includes any rules and conditions as to how the document is to be structured for different scenarios. Users complete a wizard and the template compiles the appropriate contents.

Imagine you want to answer a recurring question from your customers with a professional and consistent document. Instead of explaining to all sales employees how to create such a document, you prepare a corresponding template with empower® Document Automation. The sales team needs to answer only a few customer- or deal-specific questions, and empower® Document Automation creates a fresh new document – always current and consistently design-compliant. Whenever a document must be created according to certain rules and this occurs regularly, empower® Document Automation will streamline the process.



empower[®] Document Automation integrates them all

empower[®] Document Automation can be applied to any use case; it integrates with a wide range of other systems. For instance, structured data stored in SharePoint can be used to automatically create documents, e.g. resume data, financial data, projects, references, minutes, etc.

empower[®] can be integrated with any REST API systems. These include Salesforce, HubSpot, Adobe, SAP, Frontify and many more.



empower[®] Document Automation benefits at a glance

- ✓ Dynamic template automation
- ✓ Easy and fast template customization
- ✓ Use of any data source and integration into all systems
- ✓ Automated document creation according to individual, flexible automation specifications
- ✓ Intuitive and easy usability
- ✓ Ensured conformity with corporate design

Document automation as an opportunity



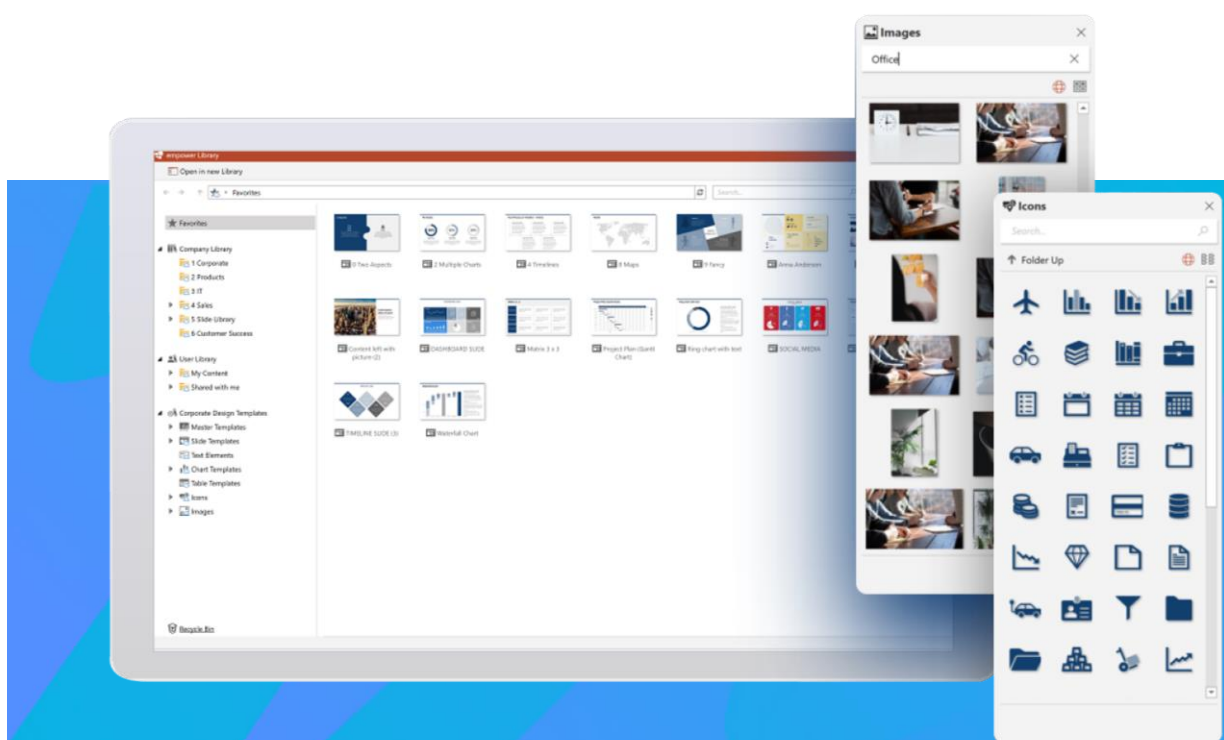


Automated document assembly is an important step towards greater efficiency and consistency in document creation. It streamlines and standardizes essential business processes, which can be a decisive competitive advantage. Thanks to its broad applicability, document automation can be used in a wide range of industries, companies, and departments.

The flexibility and clarity of the right document automation software reduces stress and enhances compliance because people work more quickly and confidently, eliminating redundant work steps.

empower® Document Automation is the perfect partner for automated document creation: compatible with other systems; simple, time-efficient operation; highly flexible template creation and management; easy, instant, dynamic implementation of changes.

If you would like to learn more about empower® Document Automation or have any questions, please feel free to **contact us**.





empower GmbH

KölnTurm
Im Mediapark 8
50670 Cologne

Telephone EN US: +1 800 6570270
Telephone EN EU: +49 221 993785 77
E-mail: request@empowersuite.com

empowersuite.com

Sources

Active Docs. 2022. "Automated Document Production." In Active Docs Document Automation Software: <https://www.activedocs.com/product/architecture/adp.html> (last accessed 08/09/2022)

Avvoka Academy. 2021. "The Ultimate Guide – Document Automation." In Avvoka Academy: <https://academy.avvoka.com/document-automation-the-ultimate-guide/>. (last accessed 08/02/2022)

Bauer, Christian und Monika Friedrich (resp.). 2022. „Warum Dokumentenautomatisierung ein Muss ist“. In Dox 42: https://www.dox42.com/de/Scenarios/dokumentenautomatisierung?gclid=CjwKCAjwj42UBhAAEiwACIhADvM8uGPH0NKoe-LsL482D6DubgUtLRaSRFulip-vsiEL43_kh4WBZxoCQm4QAvD_BwE. (last accessed 08/09/2022)

Bigtincan. 2022. "What is Document Automation". In Bigtincan: <https://www.bigtincan.com/what-is-document-automation/>. (last accessed 08/09/2022)

Dilmegani, Cem. 2022. „The Ultimate Guido to Document Automation in 2022.“ In aimultple: <https://research.aimultiple.com/document-automation/>. (last accessed 08/09/2022)

Hockemeyer, Cord. 2019. „Neue Möglichkeiten und besser Produktivität mit einem PIM-System“. In Interlink: <https://www.interlink.team/insights/neue-moeglichkeiten-und-vereinfachungen-mit-einem-pim-system>. (last accessed 08/09/2022)

IDC: 2019. "IDC Studie: 46 Prozent der Unternehmen evaluieren Print und Document Management-Lösungen mit RPA- und KI-Funktionen." In Datendschungel: <https://www.datendschungel.de/2019/allgemein/idc-studie-46-prozent-der-unternehmen-evaluieren-print-und-document-management-loesungen-mit-rpa-und-ki-funktionen/>. (last accessed 08/09/2022)

Keller, Jannik (resp.). 2022. „Aufgaben Consulting. Was macht das Consulting.“ In Campusjäger: <https://www.campusjaeger.de/karriereguide/berufswelt/aufgaben-consulting#aufgaben> (last accessed 08/09/2022)

Kofax. 2022. „Kofax-Benchmark-Studie 2022 zur intelligenten Automatisierung.“ In Kofax: https://www.kofax.de/learn/reports/kofax-2022-intelligent-automation-benchmark-study?utm_source=PR&utm_medium=press_release&utm_campaign=2022IA_BenchmarkStudy. (last accessed 08/09/2022)

O'Neill, Sean. 2017. „What is Document Automation.“ In HotDocsVideo:
<https://www.youtube.com/watch?v=YLgP3b2wvrE> (last accessed 08/09/2022)

Safar, Milad. 2022. „Document Automation. Mehr als nur die Digitalisierung von Dokumenten“. In Weissenberg: <https://weissenberg-group.de/document-automation-mehr-als-nur-die-digitalisierung-von-dokumenten/>. (last accessed at 08/02/2022)

Salesforce. 2022. CRM Lösung Produktseite. Salesforce:
https://www.salesforce.com/de/campaign/sem/sales-cloud/?d=7010M000000ujjXQAAQ&utm_source=google&utm_medium=sem&utm_campaign=de_alllobcon&utm_content=_7010M000000ujjXQAAQ&soc=Google-sales-cloud&ef_id=Cj0KCQjwhLKUBhDiARIsAMaTLnFHjx8yAnYUSRf2TFw-lpmU8fOcHu-w2pq6bwmmRRdh7xwpkLE6sU8aApfVEALw_wcB:G:s&s_kwcid=AL!7501!3!384317010367!e!!g!salesforce&mkwid=scKCvDIHy&pcrid=384317010367&pkw=salesforce&pmt=e&pdv=c&gclid=Cj0KCQjwhLKUBhDiARIsAMaTLnFHjx8yAnYUSRf2TFw-lpmU8fOcHu-w2pq6bwmmRRdh7xwpkLE6sU8aApfVEALw_wcB. (last accessed 08/09/2022)

SAP. 2022. „HR-Software und Personalmanagement“. Bei SAP:
<https://www.sap.com/germany/products/human-resources-hcm.html>. (last accessed 08/09/2022)

Sterigopoulos, Konstantin. 2022. „Product Information Management“. In pirobase imperia:
https://www.pirobase-imperia.com/de/solutions/pirobase-pxm/pirobase-pim?gclid=Cj0KCQjwhLKUBhDiARIsAMaTLnHtIA3qzli-N3tRKNB4aR3pCg2xIDEQSHSFvKLFi7EKRZ2XDNqb7I0aAvhkEALw_wcB. (last accessed 08/09/2022)

Strébely, Melinda, Arnaud Leplad und Gauthier Moens. 2016. „How to meet top management reporting expectations.“ In Deloitte:
https://www2.deloitte.com/content/dam/Deloitte/be/Documents/finance/TopManagementReportingSurvey_PoV.pdf. (last accessed 08/09/2022)

Szymanski, Jaimy. 2021. „Automated Content: How Artificial Intelligence Impacts Content Throughout the Organization.“ In Kaleido:
<https://www.kaleidoinsights.com/reports/automated-content-how-artificial-intelligence-impacts-content-throughout-the-organization/>. (last accessed 08/09/2022)

Quadient. 2020. „How Automation Impacts Document Workflow: A Pilot Study“. Quadient Whitepaper.

Van der Meulen, Rob. 2020. „10 Trends die die Finanzabteilung jetzt kennen muss.“ In Gartner: <https://www.gartner.de/de/artikel/10-trends-die-die-finanzabteilung-jetzt-kennen-muss>. (last accessed 08/09/2022)