

IS IT TIME TO AUTOMATE YOUR WORKFLOW? A COMPREHENSIVE CHECKLIST

CURRENT WORKFLOW ANALYSIS	YES	NO
Are documents sorted and arranged before scanning?		
Is there a team dedicated to removing staples, paper clips, and other bindings?		
Are documents manually fed into scanners?		
Is there a need for continuous monitoring and troubleshooting during scanning?		
Are scanned images reviewed for quality issues such as missing pages or poor image quality?		
Is there a dedicated team for post-scan QC?		
Are more than five full-time employees involved in the document preparation, scanning, and QC processes?		
Does the entire document preparation, scanning, and QC process take longer than one day?		
Are the scanners currently used outdated or not automated in the QC process?		
Would adopting a “One-Touch” process significantly reduce labor costs and improve efficiency?		
Are you aiming to implement energy-efficient and sustainable operations?		
TOTAL		

ASSESS YOUR ANSWERS

If you answered “Yes” to 7 or more questions:

A high number of yes responses indicates your workflow may need an overhaul! It’s time to start analyzing your procedures and seeing what you can improve. Are you spending a significant amount of time prepping? Is your process labor-intensive or full of errors?

If you answered “Yes” to 4-6 questions:

You are on your way to a streamlined workflow, but what’s missing? Do you have staff that can be reassigned to more value-added tasks? Would updating your process improve downstream processes?

If you answered “Yes” to 3 or fewer questions:

Good for you! It looks like you know what it takes to create an efficient workflow. Tell us what changes you made to make it successful.

KEY CONSIDERATIONS FOR CHANGE MANAGEMENT:

Are you ready to improve your workflow?

Do you have a change management strategy in place for new processes?

Have you planned for retraining staff and gaining buy-in from stakeholders?

Have you conducted a cost-benefit analysis?

Are expected short and long-term financial benefits of the upgrade clear?

Do you know the long-term costs and missed opportunities from not upgrading your processes?

Have you evaluated potential revenue increases from higher efficiency and productivity?