

Removing Barriers to AI Adoption in Document Processing

Go beyond conventional document processing to boost the effectiveness and efficiency of your document workflows with AI and automation



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In recent decades there have been significant advancements in automated document processing technologies, such as Optical Character Recognition (OCR) and Robotic Process Automation (RPA), that have dramatically transformed document processing operations. These technologies have helped organizations in various industries to move away from labor-intensive and costly manual processes toward streamlined, scalable, and more effective operations.

As organizations continue to innovate, however, traditional OCR and RPA methods may no longer provide a competitive edge. It is essential to explore more advanced technologies such as artificial intelligence (AI) to augment your document processing operations. AI-powered document processing, also known as Intelligent Document Processing (IDP), can help improve efficiency, reduce errors, and provide faster service, leading to increased customer satisfaction and improved profitability.

Although AI has the potential to revolutionize document processing, obstacles remain that hinder its widespread adoption. Many businesses are hesitant to adopt AI and IDP solutions due to the perceived barriers that come with them.

This guide looks into some of the common pain points that organizations face when considering AI/IDP adoption, and explains how to overcome them. We start with the whys of AI document processing, move to specific business gains, and conclude by removing existing barriers to AI adoption in document processing.




From Inefficiency to Optimization: The Need for AI in Document Processing




As organizations continue to evolve and compete in the digital age, it has become essential to leverage the toolkit of AI technologies to streamline processes, achieve operational efficiency, and gain a competitive advantage. One such technology that can significantly benefit your business is Intelligent Document Processing (IDP).

Below we discuss major business needs that AI-powered document processing and IDP solutions can help you address.


1. Operational efficiency

<p>AI-powered document processing can help your organization automate document workflows, reducing the time and resources required to perform manual tasks by 50% or more. By leveraging AI and IDP solutions, you can effectively eliminate repetitive and time-consuming manual processes, reduce errors, and increase productivity, leading to a 60% increase in operational efficiency.</p> 	<p>Key metrics to improve:</p> <ul style="list-style-type: none">• Processing time• Error rate• Cost per transaction• Document throughput• Customer satisfaction• Compliance	<p>Roadblocks to consider:</p> <ul style="list-style-type: none">• Poor data quality• Lack of AI expertise• Resistance to change• Integration challenges• Security and privacy concerns• Implementation costs
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2. Exploration of business opportunities

<p>AI and IDP solutions can help you identify new business opportunities to streamline your document processing workflows and reduce costs. By using advanced AI/ML algorithms, your organization can extract valuable insights from your data up to 10 times faster, enabling you to make well-informed decisions and identify new areas for business growth and expansion.</p> 	<p>Key metrics to improve:</p> <ul style="list-style-type: none">• Document volume• Data quality• Multi-tier data access• Time to insight• BI & Analytics integration	<p>Roadblocks to consider:</p> <ul style="list-style-type: none">• Data accessibility• Limited scope of IDP adoption• Inadequate IT infrastructure• Resource constraints• System integration challenges• Regulatory compliance
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3. Customer satisfaction

<p>By automating your document processing workflows with AI and IDP, you can dramatically improve the accuracy and speed of your services, resulting in up to 2x faster response times and improved customer satisfaction. IDP can help you deliver a personalized experience to your customers, increasing customer loyalty and driving revenue growth through better BI & Analytics.</p> 	<p>Key metrics to improve:</p> <ul style="list-style-type: none">• Turnaround time• Document accuracy• Responsiveness• Document accessibility• Personalization	<p>Roadblocks to consider:</p> <ul style="list-style-type: none">• Poor data quality• Limited understanding of customer needs, with or without AI• Lack of customer trust• Inadequate IT infrastructure• Privacy and security concerns• System integration challenges
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4. Business agility

<p>AI and IDP solutions can provide a high degree of flexibility and customization, enabling your organization to adapt quickly to changes in the market and meet evolving customer needs. By using AI to almost entirely automate your document processing workflows, you can achieve greater business agility, enabling you to respond to new opportunities and challenges.</p> 	<p>Key metrics to improve:</p> <ul style="list-style-type: none">• Document processing speed• Workflow automation (RPA)• System flexibility• Stakeholder collaboration• BI & Analytics integration	<p>Roadblocks to consider:</p> <ul style="list-style-type: none">• Company-wide resistance to change• Limited understanding of AI and IDP• Data quality, availability, and accessibility• System integration challenges• Regulatory compliance concerns• Talent acquisition
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5. Increased ROI and cost optimization

<p>By streamlining and scaling your document processing workflows with AI and IDP, you can reduce costs by 30-70%, improve efficiency by 60-90%, and increase ROI by 30-200% YoY. IDP can help you achieve cost savings through automation, reduce the risk of errors and improve compliance, resulting in more efficient operations and lower costs.</p> 	<p>Key metrics to improve:</p> <ul style="list-style-type: none">• Reduction in manual labor• Reduction in errors• Document processing time• Scalability• Regulatory compliance• Reduction in storage costs	<p>Roadblocks to consider:</p> <ul style="list-style-type: none">• High upfront costs• System integration complexities• Data quality, availability, and accessibility• Limited AI/IDP use cases• Regulatory compliance concerns• Limited in-house talent pool
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IDP solutions can help you achieve your business goals and address your needs for more efficient document processing. Further on, we will take a closer look at the gains that IDP can bring to your organization.

Unlocking the Power of AI and IDP for Enhanced At-Scale Document Processing

As organizations generate and manage larger volumes of documents, leveraging AI for automation becomes a must, to reduce the time, effort, and costs involved. Let's see what specific advantages organizations can gain by utilizing AI and IDP solutions.

1. Addressing customer needs quickly and cost effectively

By using AI and IDP solutions, your organization can automate and streamline your document processing workflows, enabling you to meet the demands of your customers for faster, more accurate, and personalized services.

Consider these four drivers of value:



Faster processing time

IDP solutions can process large volumes of documents in a matter of seconds or minutes, significantly reducing the time it takes to respond to customer demands. This can lead to faster turnaround times and improved customer satisfaction.



Increased accuracy

IDP solutions accurately extract and process data from documents, reducing the likelihood of errors and improving the quality of output. This can help businesses to meet customer demands more efficiently and effectively.



Cost savings

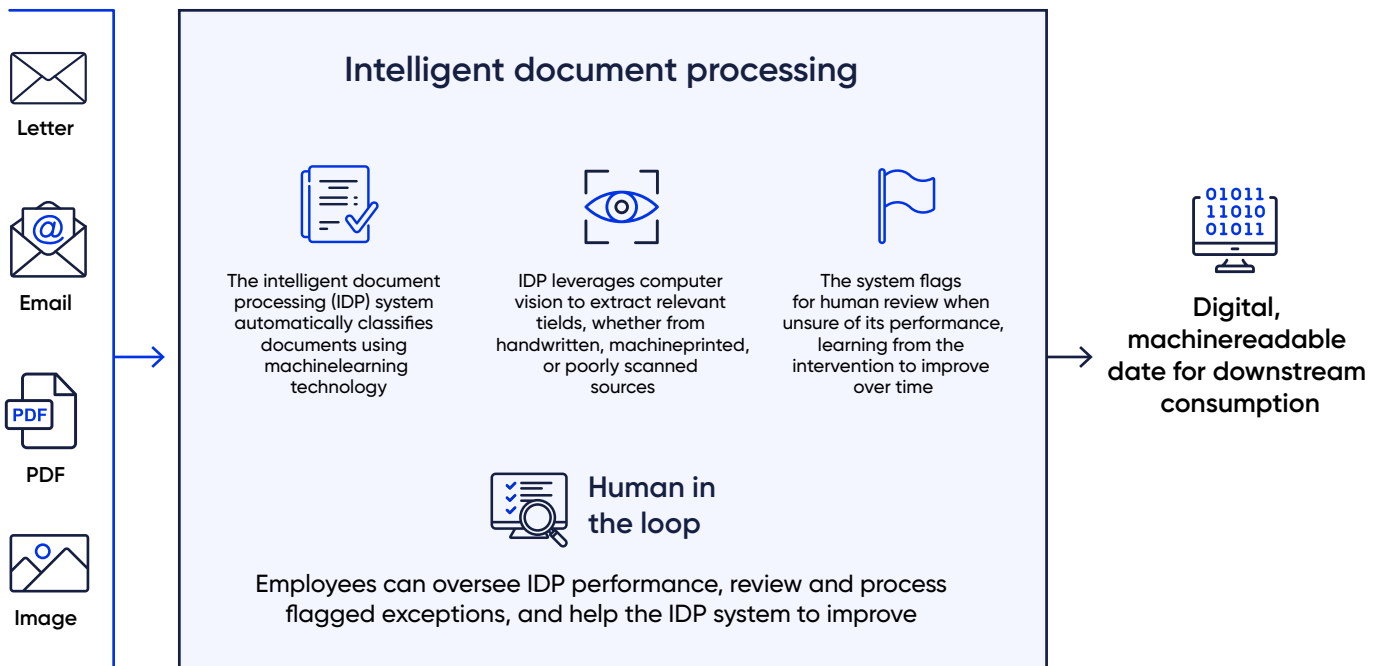
IDP solutions reduce the need for manual intervention and help to streamline operations. This can lead to cost savings in terms of time and resources, which can be passed on to customers in the form of lower prices or improved services.



Compliance

As a constantly evolving and retrainable system, IDP helps businesses to comply with industry regulations and standards, ensuring that customer demands are met in ways that are both efficient and legally compliant.

Bear in mind that data, including that which is extracted from documents, is central to any digital or AI transformation effort. **Approximately 80% of business data today** exists in unstructured formats like emails, images, business documents, and PDF documents.



IDP: From documents to data for BI & Analytics

The ability of IDP to unlock insights from any type of document means faster digitalization, more efficient AI adoption, and higher quality of BI & Analytics – all of which naturally translate into customer value.

2. Achieving business agility and scalability

Most AI solutions offer a high degree of flexibility and scalability, enabling your organization to scale your operations and adapt to new opportunities and challenges. By using AI to automate your document processing workflows, you can achieve greater business agility, to quickly respond to new opportunities and expand your operations to new markets.

Greater business agility and scalability are achieved through:

- **Document processing speed.** IDP solutions can process large volumes of documents quickly and accurately, reducing the time it takes to complete tasks and respond to customer demands. This can help businesses to be more agile in their operations and respond more quickly to changes in the market.
- **Automation of manual tasks.** IDP solutions can automate many manual tasks associated with document processing, reducing the need for human intervention and freeing up staff to focus on higher-level tasks. This can help businesses to scale more easily without adding significant overhead costs.
- **Improved data management.** IDP solutions can help to manage large volumes of data more effectively, providing insights and analytics that can inform decision-making and improve business processes. This can help businesses to be more agile in their operations, responding more quickly to changes in the market or customer demands.

It is important to note that AI is not a silver bullet. While it can be possible to improve business agility by implementing a single AI use case (e.g. data capture, data extraction, data-to-insight), it is more challenging to scale AI across the organization, because it requires **fundamental changes in IT infrastructure, operations and processes, and company culture.**

3. Improving the efficiency of operations

AI-powered document processing solutions can significantly improve the effectiveness, efficiency, and accuracy of your operations through:

- Higher level of automation of manual tasks and processes
- Faster and more accurate processing of documents, on a larger scale
- Streamlined workflows, from digitized documents, to data extraction and conversion, to actionable insights
- Better data quality, management, and governance, which create a positive cumulative effect for AI/ML & Data Analytics projects






The operational improvements that IDP solutions deliver are massive. One example is an engineering firm that was able to cut its RFP response time from three weeks to one with IDP, and to process 400% more RFPs than it could with a staff of 80 people reading complex diagrams in documents.

Another example is a global life sciences consultancy that [scaled its pipeline for processing of FDA Form 483 observations](#), achieving 70% accuracy in document classification. They were able to decrease the time spent on manual review, optimize processing costs, and increase accuracy and throughput of document processing while mitigating risks of infractions made by mappers and reviewers.

4. Adopting customer satisfaction as a KPI

AI and IDP can help to dramatically improve your customer satisfaction levels by delivering more accurate and personalized services, faster and at scale. Most importantly, they enable your organization to incorporate customer satisfaction as a key performance indicator for your business.

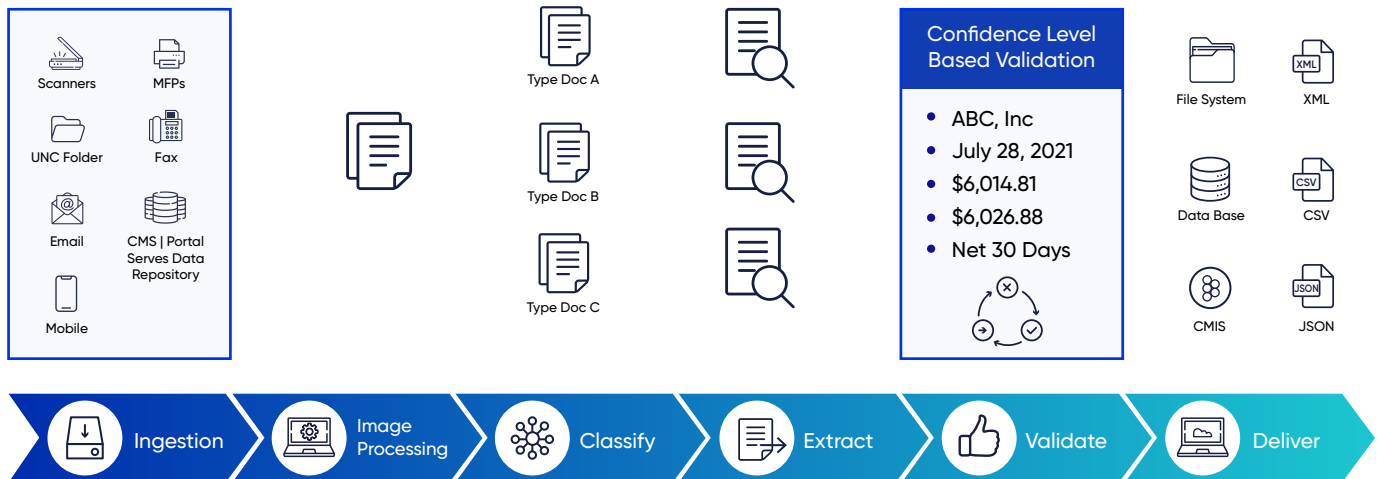
Customer satisfaction KPIs to measure in document processing:

	Turnaround time Measures the time it takes to process a document and return it to the customer. Ensure timely processing and reduce wait times for customers, leading to higher customer satisfaction.
	Accuracy rate Measure the percentage of documents processed without errors. Ensure accuracy, reduce rework and costs, and help customers to access your services as quickly as possible.
	Processing volume Measure the number of documents processed in a given time frame. Ensure that your organization meets customer demands in a timely fashion and efficiently handles high volumes of documents.
	Customer complaints Measure the number of complaints received from customers related to document processing operations. Identify areas for improvement and take corrective action to improve customer satisfaction.
	First-time resolution rate Measure the percentage of documents that are correctly processed on the first attempt. Ensure efficiency and reduce customer frustration caused by multiple document iterations.

Other areas for improvement are document accessibility, service personalization, and 24/7 availability. These lead to a more user-friendly experience, increasing customer satisfaction.

5. Improving document storage and usage

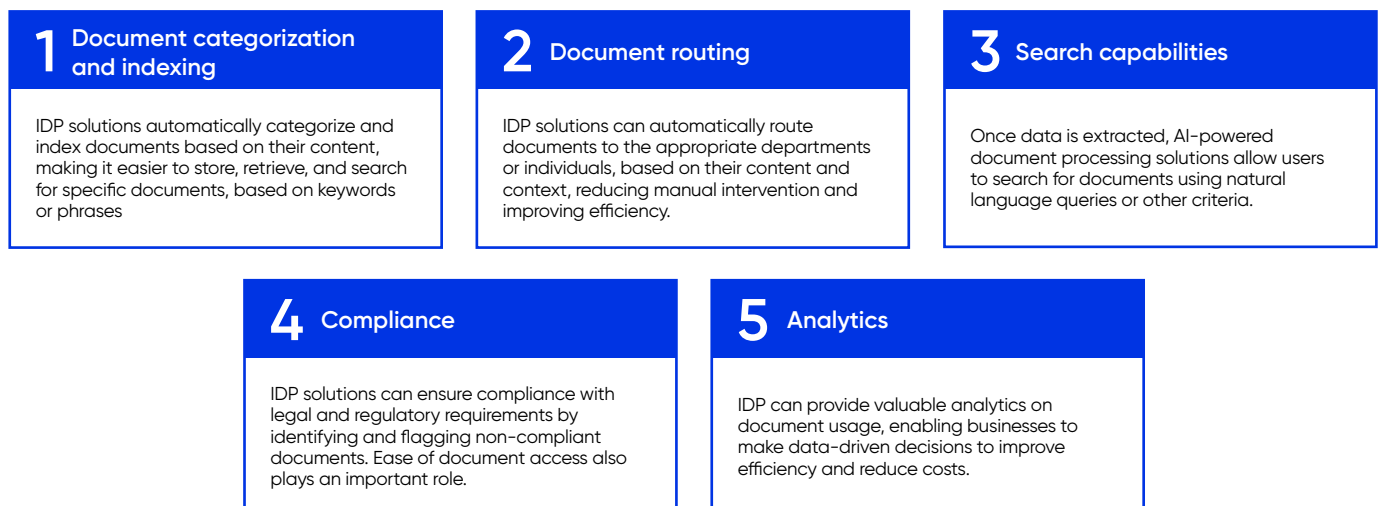
AI offers advanced document storage and retrieval capabilities, enabling you to more efficiently manage and utilize your documents. By using IDP, you can extract valuable insights from different types and formats of documents, to make business-critical decisions based on data rather than on assumptions.



Standardized document processing workflow

As seen in the above image, the document processing workflow is a journey from machine-unreadable to machine- and human-readable data. IDP solutions provide better document storage and usage capabilities, making them a major part of the value chain from data to insights.

Better document storage and usage helps with:



In today's competitive business environment, it is imperative to take advantage of every opportunity to stay ahead. AI gives you the tools to augment document processing operations. However, there are several barriers to AI adoption that can hinder successful implementation of IDP solutions. In the next section, we will discuss these barriers in more detail, and suggest strategies to overcome them.

Breaking Through Barriers: Overcoming Hurdles to AI and IDP Adoption

Adopting AI and IDP has numerous potential benefits, but it also comes with a range of challenges that need to be addressed for successful implementation.



1. Ever-increasing competition

In a highly competitive business environment, you need to invest in AI technologies and automation tools that can help you streamline and scale your document processing workflows. The problem is that your competitors are probably doing the same thing. How can your organization stand out from the crowd?

Tips on successful adoption of AI and IDP:

- Start by understanding what AI is and how IDP can help your organization to achieve your business objectives. C-level executives and other key stakeholders should be on board with your IDP implementation initiative.
- Identify use cases where IDP can have the greatest impact on your organization (e.g. invoice processing, contract management, document classification). To zoom in, assess your current document workflows.
- Assess and prepare your data by cleaning, formatting, and categorizing it, to ensure that your AI models can learn from it effectively. Attract niche experts who can help developers to handle and understand your data.
- Train your AI models on a diverse range of data sets, to ensure that they can accurately recognize and classify documents of varying types, formats, and complexity.
- Once your IDP solution is deployed, monitor and evaluate its performance regularly. This will help you to identify areas for improvement and ensure that your solution continues to meet your business objectives.
- AI-powered document processing involves handling sensitive and confidential information, so it is important to ensure that your solution is secure and compliant with relevant regulations and standards.

For organizations lacking internal AI/IDP expertise and talent, it is critical to **choose the right IDP vendor**. Such factors as data availability, infrastructure readiness, and employee resistance to change can be addressed by an experienced provider of IDP development services.

Questions to ask yourself when evaluating potential IDP vendors:

1. What is the vendor's level of expertise in developing and implementing IDP solutions?
2. Does the vendor have experience in my industry or use case? Have they worked with businesses similar to mine?
3. What is the vendor's track record in delivering IDP solutions? Can they provide case studies or references?
4. What level of support and maintenance does the vendor provide for their solution? Is it included in the pricing, or is there an additional cost?
5. What level of customization is available with the vendor's solution? Can it be tailored to my specific business needs?
6. What is the vendor's approach to data security and compliance? Do they have a track record of meeting relevant regulations and standards?
7. How difficult will it be to integrate the vendor's solution into my existing systems and workflows?
8. What is the vendor's pricing model for their solution? Is it a one-time fee or an ongoing subscription? Are there any hidden costs?
9. Does the vendor provide training and support for my team to effectively use the IDP solution?
10. What is the vendor's roadmap for future development of their IDP solution? Will it continue to meet my business needs and keep up with industry advancements?

By choosing the right IDP vendor *and* the right IDP solution from the start, your organization will have a better chance of holding its place among the ever-increasing competition.

2. Poor profitability and low margin for growth

The adoption of AI and IDP can lead to significant cost savings, increased productivity, and improved profitability. To invest in the right solution, conduct a cost-benefit analysis to determine the potential cost savings and the best ROI.

However, even after your IDP solution is up and running, you should work continually to maximize its potential for profitability and growth.

Tips on improving your IDP solution's profitability and growth:

- **Identify additional use cases.** Once IDP is implemented in one area, identify other areas where the AI technology can be leveraged. For example, if the solution is implemented for invoice processing, it can also be used for expense reports or purchase orders.
- **Continuously improve the quality of data.** Identify and correct errors, categorize data accurately, and update the training data used for AI models. Continuously assess your document processing workflows as well.
- **Evaluate performance regularly.** Regularly evaluate the performance of your IDP solution to identify areas for improvement and ensure that it continues to meet business objectives. This may include measuring accuracy, efficiency, and cost savings.
- **Explore integration with other technologies.** IDP can be augmented by such technologies as robotic process automation (RPA), natural language processing and understanding (NLP/NLU), human-in-the-loop (HITL), and many others, to further streamline document workflows and increase efficiency.
- **Develop a change management plan.** Implementing new technology can be challenging for employees, so it is important to develop a change management plan that includes training, communication, and support to help employees adopt the new solution. Ask your IDP vendor for help.
- **Monitor regulatory and compliance changes.** Be aware of regulatory and compliance changes that may affect the implementation of IDP. This includes data privacy laws, industry-specific regulations, and security standards.
- **Leverage insights from analytics.** IDP solutions generate a wealth of data that can be used to identify trends and insights. Leverage this data to inform business decisions, identify opportunities for improvement, and optimize document processing operations.

As with any AI solution, IDP is a work in progress that needs to be continuously maintained. Do not consider it a done deal once the models are deployed; this is only the beginning stage of a successful, value-driven AI project.

3. Poor efficiency of document operations

IDP can significantly improve the effectiveness and efficiency of your document processing operations, end to end. Opt for IDP solutions that can enable document processing at all stages, from data extraction to document classification, to BI & Analytics.

Tips for achieving more efficient end-to-end document processing:

Standardize document formats <p>Removing the format roadblock can help improve the efficiency of end-to-end document processing. While this problem may be not as acute as with OCR, standardizing file types, naming conventions, and document structure is recommended.</p>	Automate document routing <p>Organizations can use AI-powered document processing solutions to automate the routing of documents to the appropriate individuals or departments. This can help to reduce the time it takes to process documents and improve overall efficiency.</p>	Implement workflow automation <p>Workflow automation can empower the entire from-data-to-insight-to-value chain by helping to streamline and scale document processing operations.</p>
Use NLP/NLU for data extraction. <p>Natural language processing and understanding algorithms are perfect for extracting data from documents. By training the models to extract data from various document types, you can improve the agility and flexibility of document processing operations.</p>	Continuously improve accuracy <p>Continuously monitor the accuracy of IDP and make adjustments as necessary. This can include updating training data, fine-tuning AI/ML models, and identifying and correcting workflow errors.</p>	Optimize document search capabilities <p>Allowing users to quickly find the information they need can help improve overall efficiency and reduce the time it takes to locate and process documents.</p>

Your organization's ability to make IDP an integral part of your value chain is key to higher efficiency. Do not think of IDP as a tool for extracting data points from documents; instead, focus on leveraging data availability to drive efficiencies through more informed decision-making.



4. Dependency on external providers

Relying too much on external providers can be a problem. Look for IDP solutions that can provide in-house capabilities, such as customization and integration with existing systems. This can give you greater control over your IDP operations, and help mitigate risks associated with dependency on a third party.

Over the long run, your organization can also:

- Start to build in-house expertise with the help of your IDP vendor
- Invest in internal R&D to move away from off-the-shelf solutions to custom solutions
- Collaborate with industry partners to share datasets, expertise, and ready-to-use AI/ML models
- Use multiple vendors to reduce your dependency on a single third-party vendor
- Explore open-source solutions as an alternative to third-party vendors

Knowledge transfer is a must. Your operations *and* your IT personnel need to learn how to **make the most out of their new AI tool**. This includes the ability to manage datasets and data workflows, models and AI/ML workflows, and other integrated components. Your team may not be able to design and build a solution from scratch, but it should be able to handle its moving parts.

5. Poor customer satisfaction

AI-powered document processing is a powerful driver of customer satisfaction, enabling organizations to reduce response times and improve service delivery through faster access to document data. Because speed plays a crucial role, you should integrate your IDP solution with workflows that offer real-time customer feedback and analytics, to measure customer satisfaction and make well-informed decisions.

When it comes to AI/IDP adoption, your employees should also be treated as customers. If they are not satisfied with how your IDP solution works, they will not be able to translate its value to your actual customers.

Tips to make AI-powered document processing solutions more user-friendly:



Provide training

Providing comprehensive training to employees on how to use the IDP solution can help them understand its capabilities and make it less intimidating to use.



Simplify the interface

A user-friendly interface is critical to encourage adoption. The solution should be designed with an intuitive user interface that is easy to navigate.



Customize for specific user needs

This can include providing different levels of access and permissions, as well as the ability to customize the user interface and dashboards for Ops, BI, Analytics, IT users, etc.



Incorporate feedback mechanisms

Encourage employees to provide input and suggestions for improving the solution. This can include regular surveys or the ability to submit feedback directly within the application.



Ensure compatibility with existing workflows

The solution should integrate seamlessly with existing workflows and applications, making it easier for employees to incorporate into their daily work.



Provide user support

Providing access to user support resources such as helpdesk or chat support can help employees troubleshoot issues and address any questions they have about the solution.



Add AI explainability components

Employees should be able to quickly check and verify the results of AI's work in the user interface. Make sure that AI explainability (XAI) is a part of the IDP solution.



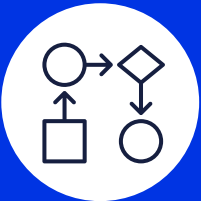
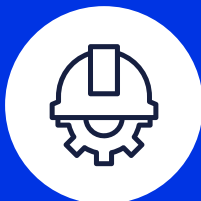


Customer satisfaction should be one of your most important KPIs. Ensuring that your IDP solution (a) delivers accurate results; (b) is smoothly integrated with other systems; and (c) is user-friendly for employees, is key to meeting this KPI in-house.

6. Budget and resource uncertainty

The adoption of AI usually requires significant investment in technology, infrastructure, and training. However, such factors as lack of clarity in project scope, uncertainty in data availability, a rapidly evolving technology landscape, need for specialized talent, and other technical and operational challenges can make it difficult to calculate your budget.

Before adopting Intelligent Document Processing, it is crucial to determine your budget for adoption and invest in the right solutions that provide the best ROI.

Tips to estimate the budget of your IDP project:

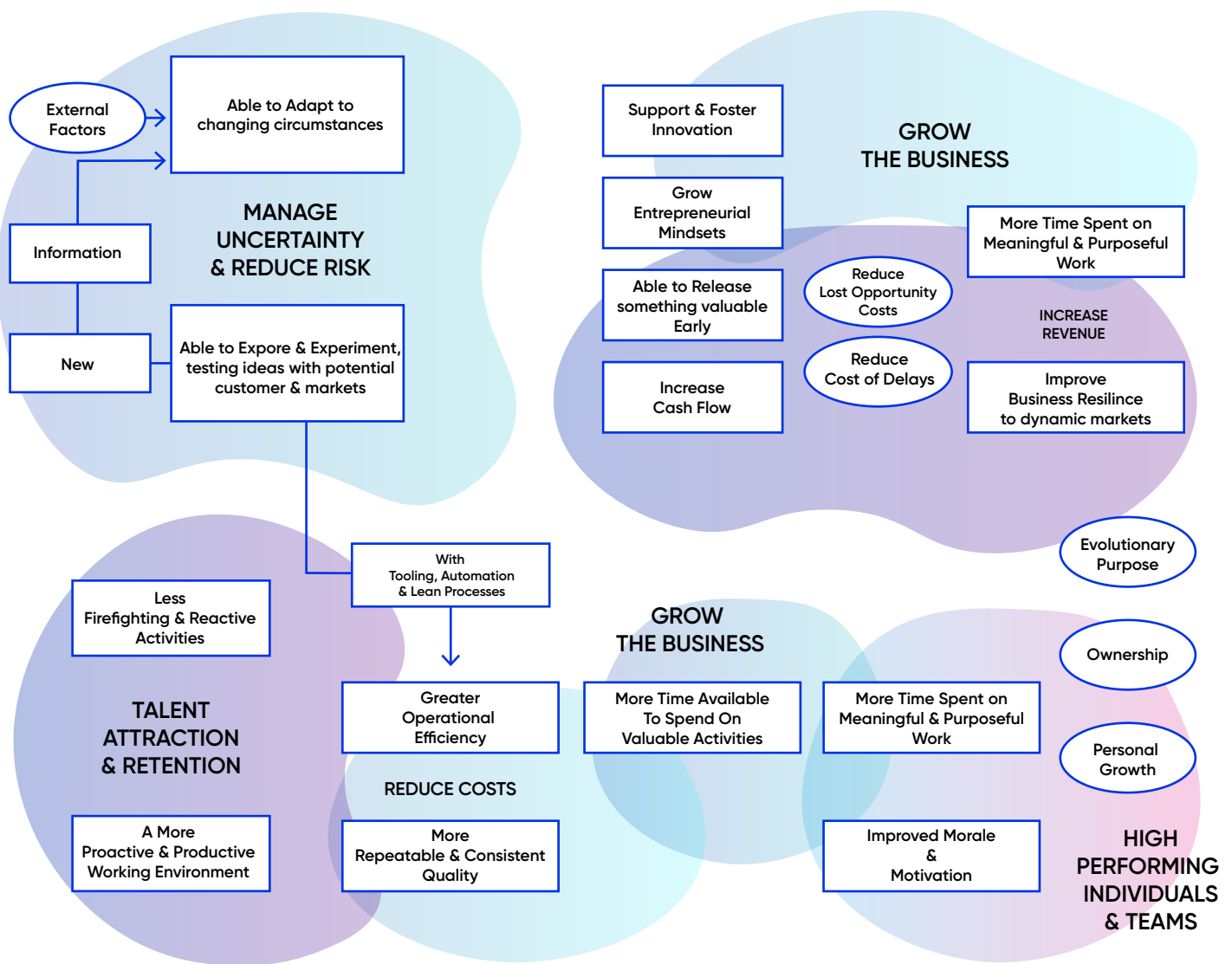
 <p>Standardize document formats</p> <p>Clearly define your business objectives, use cases, and expected ROI to better understand the scope of the project and the resources required to achieve its objectives</p>	 <p>Automate document routing</p> <p>Identify the data required to train and deploy AI/ML models, and estimate the efforts required for data preparation, cleansing, and governance, and the associated costs</p>	 <p>Implement workflow automation</p> <p>Assess the infrastructure and tools available, to identify any gaps that need to be addressed and to estimate the costs of acquiring or upgrading technology and tools required for the project</p>
 <p>Use NLP/NLU for data extraction</p> <p>Identify the skill sets required to execute the project, including data scientists, data and ML engineers, and software developers to estimate the costs of hiring or training resources</p>	 <p>Continuously improve accuracy</p> <p>Consider the deployment environment, including the required hardware and software resources, the performance and scalability requirements, and the associated costs</p>	 <p>Optimize document search capabilities</p> <p>Plan for ongoing maintenance and support of the models, including monitoring, updating, and retraining, to estimate the long-term costs of implementing your IDP solution</p>

Establishing a clear budget plan for AI and IDP is not a simple task. Any AI project is a work in progress, which necessitates a certain degree of budget flexibility. To minimize budget uncertainty, look for vendors that offer flexible pricing models that align with your business needs and provide predictable costs.

7. Low business agility affecting capitalization

As with any AI adoption initiative, IDP can impact your business agility and capitalization goals, as it requires significant changes to your existing processes and workflows.

Why Create or Increase Business Agility



Effects of high business agility on business

As is clear from the above image, there is a strong correlation between high business agility and the success of AI adoption. Companies that are able to quickly adapt to changes and implement new ideas are more likely to effectively leverage AI technology and reap its benefits, and vice versa.

Tips to minimize the effects of low business agility on business capitalization goals:

- **Develop a culture of innovation.** Encourage employees to think outside the box and experiment with new ideas. Provide them with the necessary resources and support to pursue innovative projects.
- **Foster cross-functional collaboration.** Encourage teams from different departments to work together and share their expertise. This can help break down silos and promote knowledge sharing, which can lead to better decision-making costs.
- **Streamline decision-making processes.** Simplify decision-making processes to enable quicker responses to changing business conditions. This can involve delegating decision-making authority to lower levels of the organization, or creating a more agile decision-making framework.
- **Foster cross-functional collaboration.** Encourage teams from different departments to work together and share their expertise. This can help break down silos and promote knowledge sharing, which can lead to better decision-making costs.
- **Invest in technology infrastructure.** Implement modern technology platforms and tools that enable faster and more efficient communication and collaboration across the organization. This can help to increase transparency and improve decision-making.
- **Develop agile governance structures.** Establish governance structures that are flexible and adaptable to changing circumstances. This may involve creating cross-functional teams that are empowered to make decisions and respond to changes quickly.

Your organization should also invest in AI/IDP solutions that offer seamless integration with your systems, and provide training and support to your staff.

Conclusion

The adoption of AI-powered document processing solutions can offer significant benefits to businesses, but successful implementation requires that you address several challenges. Common pain points associated with IDP adoption include constantly increasing competition, low margin for growth, poor efficiency of document processing operations, dependency on external vendors, inability to improve customer satisfaction, and various operational constraints.

Businesses can proactively overcome these barriers by partnering with reliable providers who specialize in developing customized solutions, tailored to meet specific business objectives.

In this guide, we looked into some of the common pain points that businesses face when considering AI/IDP adoption, and explained how you can overcome them in your organization. We began with the whys of AI document processing, moved to specific business gains, and concluded by offering specific tips for addressing IDP adoption challenges.

If you have more questions about the implementation of IDP solutions in your organization, we invite you to visit our [Intelligent Document Processing](#) page.

If you require further assistance, our team is always available to help. Please feel free to reach out to us directly, and one of our IDP experts will be happy to answer your questions and provide guidance on how our solutions can best meet your business needs.

About Provectus

Provectus is an Artificial Intelligence consultancy and solutions provider, helping companies in Healthcare & Life Sciences, Retail & CPG, Media & Entertainment, Manufacturing, and Internet businesses achieve their objectives through AI. Provectus is headquartered in Palo Alto, CA. For more information, visit provectus.com.

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