



Unlock your team's  
full potential with  
document  
automation







# Table of contents

A new productivity paradigm	3
The unmet potential of automation	4
What is document automation?	5
Are you ready for document automation?	12
The power of document automation	20
Which documents should you automate?	22
Transform your operations with S-Docs document automation	26



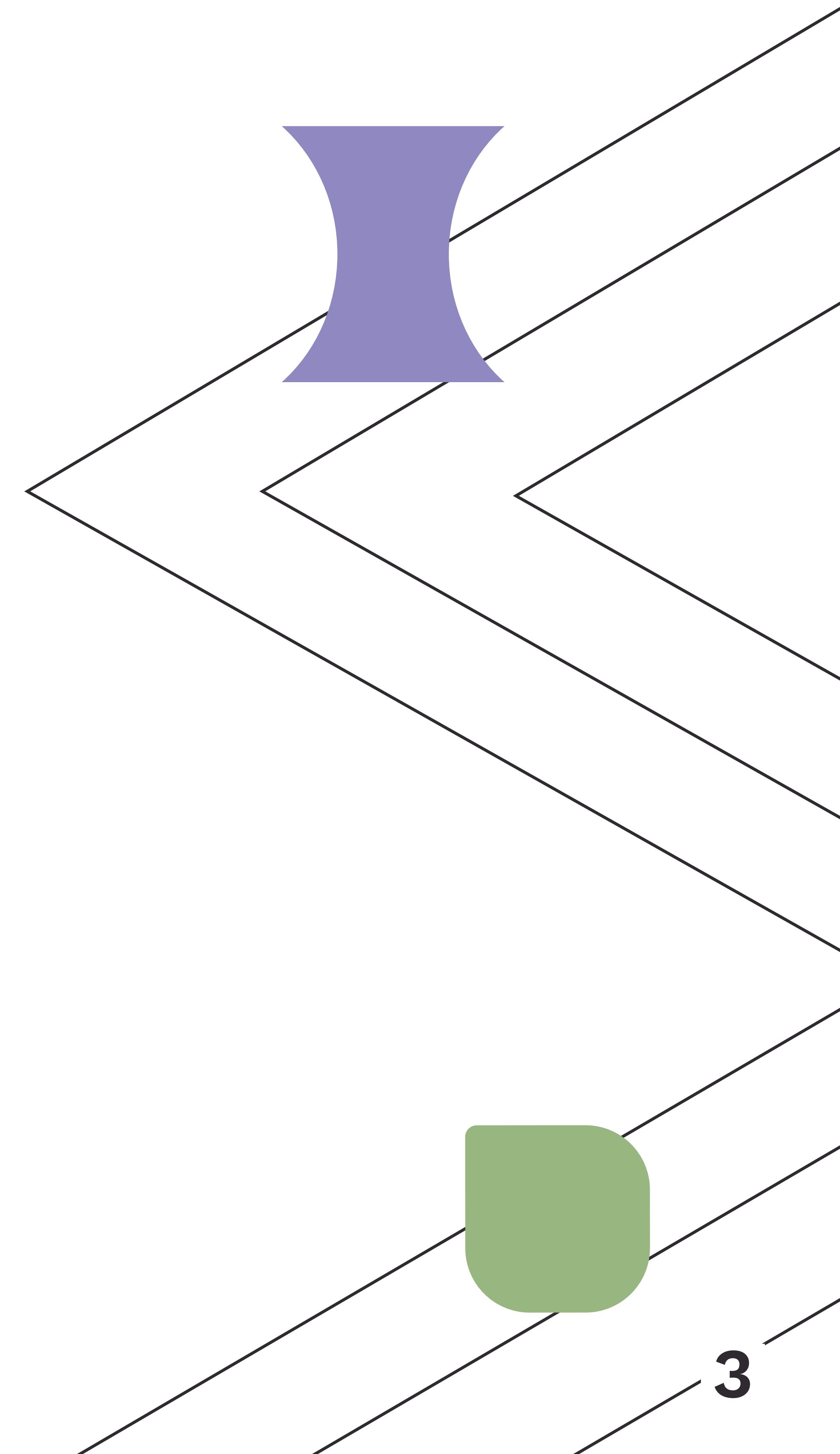
# A new productivity paradigm

Pathways to productivity shift daily. New tools pop up, best practices change, and employees optimize. But every once in a while, an inflection point comes around, reshaping the routes we take to be most effective.

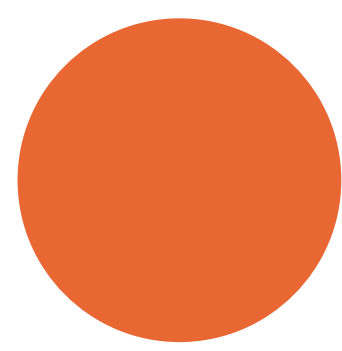
In the 1990s, the transition from physical to digital systems introduced a new era of convenience. In the 2000s, cloud computing enabled collaboration and scale on a never-before-seen level. More recently, improvements in speed and user interface design allowed us to minimize distractions, organize, and achieve a flow state for deeper, more innovative work.

Now, we're crossing into a new productivity paradigm. It focuses on *focus*, offloads excessive mental load, and breaks free from tasks that break the flow state. The next wave of efficiency is all about automating activities that disrupt deep work, empowering teams with time and energy to add value to everything they do. This path to productivity removes the menial and rote but preserves the creative and impactful. Automation has the potential to hand employees only the work that depends on their uniquely human capacity to build relationships, make decisions, and solve problems.

For those feeling pressure to improve customer experiences, enable their employees, and drive operational excellence, the implications are critical. In an era when efficiency is paramount, and technologies like generative AI are forming smarter ways for teams to spend energy, now is the time to embrace the new productivity paradigm and empower employees to be their best. Read on for insights into how organizations are rethinking efficiency and how you can fit into this transformation.







# The unmet potential of automation

Productivity is keeping business leaders up at night - 71% of them, to be precise.<sup>1</sup> Budget reductions and hiring freezes are just a few consequences of an unpredictable economy, and the pressure is on to do more with less.

The impact of automation on productivity and team effectiveness is clear. Across the globe, automation users save an average of 3.6 hours per week (that's an entire extra month per year!). And 77% of employees agree that their productivity would be greatly improved if they could automate routine tasks.

Automation can help employees not only meet KPIs, but often surpass them. 71% of employees were more likely to exceed the expectations of their managers when they utilized automation.

In many cases, though, these unmistakable benefits go unrealized. Only 45% of business leaders report prioritizing automation, and just 23% of executives invested in technology to boost productivity in the last 6 months.

This indifferent attitude can have real consequences. 81% of customers, aware of what's possible with today's tech, expect faster service<sup>2</sup> - and 92% would switch companies after two or three experiences that didn't meet their expectations.<sup>3</sup>

Internally, sales reps report spending only 28% of their time selling<sup>4</sup>, devoting the rest of their week to repeatable administrative tasks that don't directly advance organizational goals. And across all job functions, employees are spending 23% of their time on tasks that make them look productive but don't actually add value.

Customers, employees, and our economic climate are demanding the highest levels of efficiency and productivity. With limited resources, business leaders must evaluate what they can automate to enable their teams to be their best.

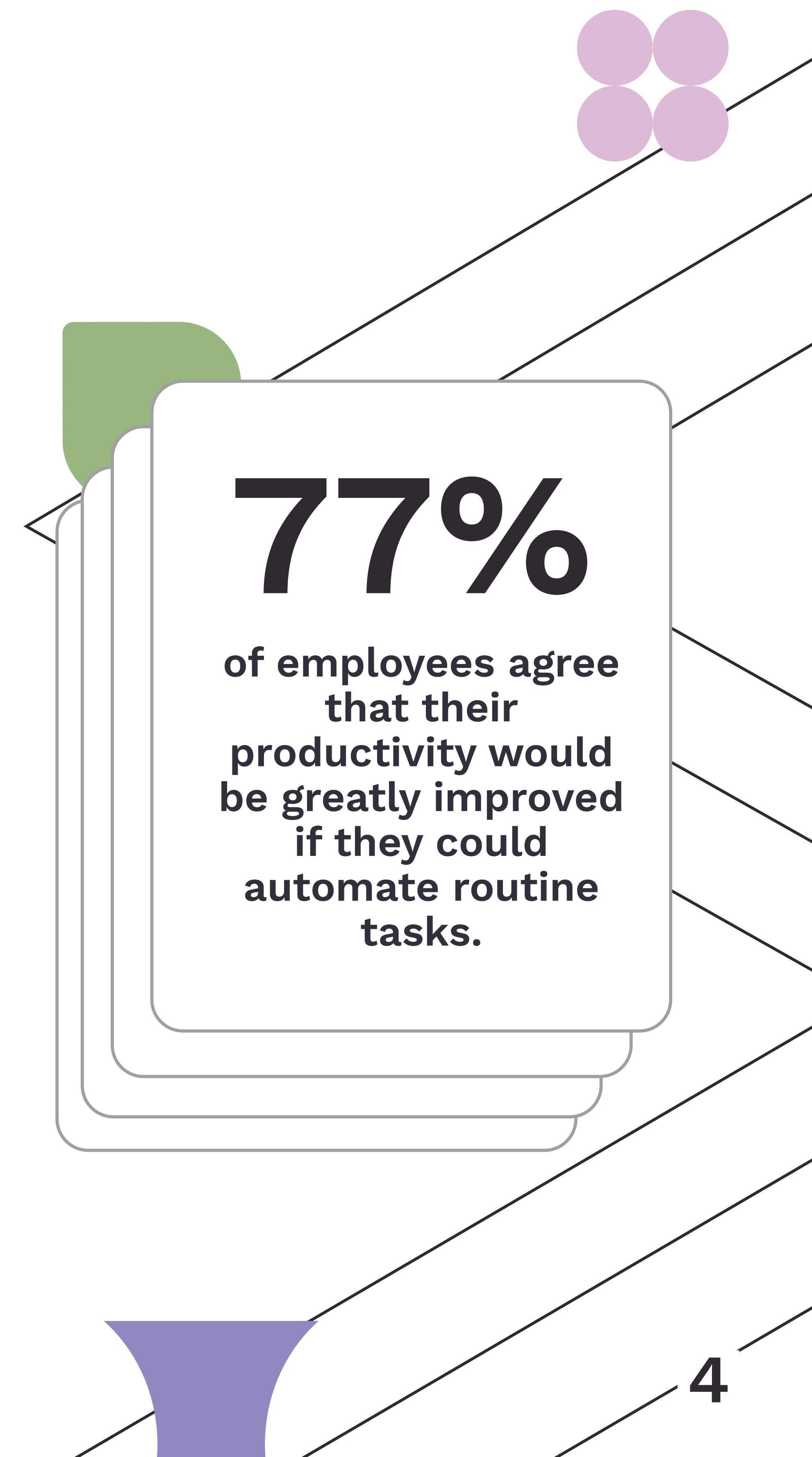
---

<sup>1</sup> Slack from Salesforce State of Work Report 2023

<sup>2</sup> Salesforce State of the Connected Customer Report, Sixth Edition

<sup>3</sup> PWC, Experience Is Everything: Here's How To Get It Right

<sup>4</sup> Salesforce State of Sales Report 2022

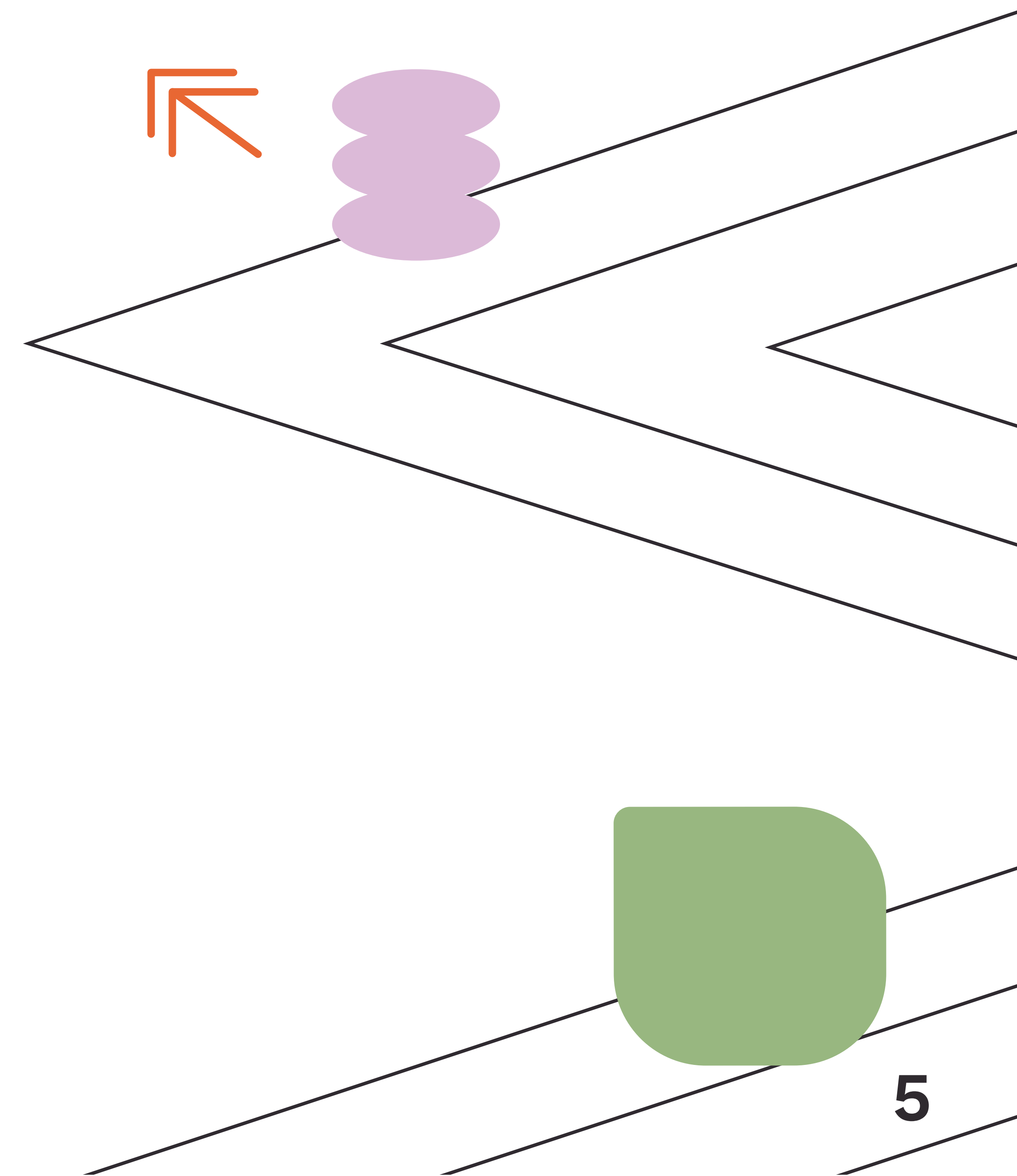


# What is document automation?

Documents are ubiquitous in business and come in all shapes and sizes. As universally required but highly variable assets, it's no surprise they drain an immense amount of employee time. Though document creation is an operational necessity, it's a significant departure from the deep work that truly advances an organization.

This presents a massive opportunity: if you can automate all or part of a document process, there's potential to extract hundreds of new productive hours. Document automation can be one of the most impactful changes an organization can make to empower employees and better serve their customers.

Every organization is unique, and "document automation" won't mean the same thing across the board. Some document processes need to reduce clicks but maintain flexibility, while others are suited to fully removing users from the equation. Let's explore the levels of automation and their differences.





# User-driven automation

At a basic level, document automation is a process that pulls data from different systems and embeds it into document templates, as well as processes logic, approvals, and more.

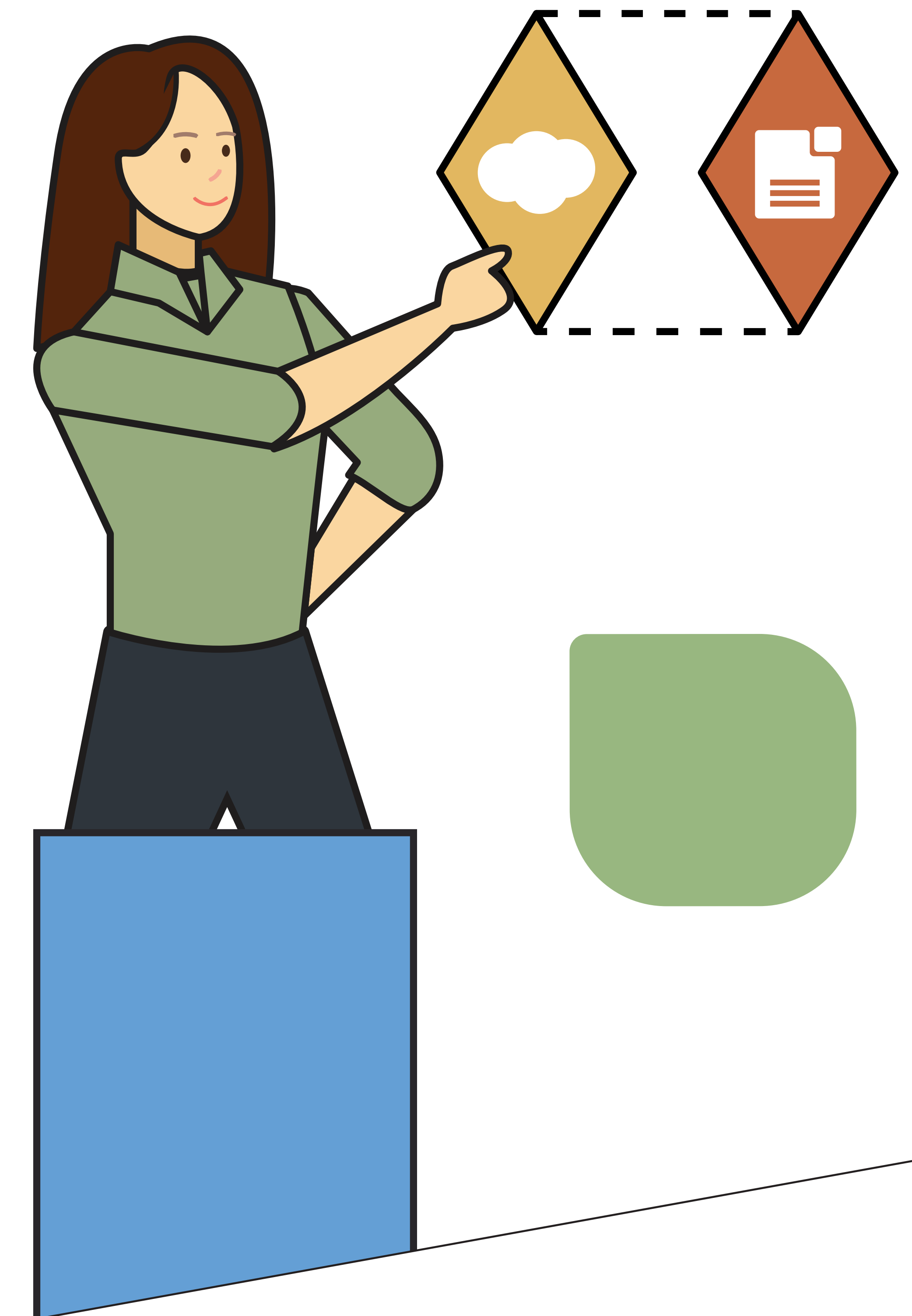
For example, a sales rep might click a button, choose a template, and receive an automatically generated quote with customer details and pricing in place. This turns a significant time investment - finding information, filling out details, formatting, and more - into a few clicks.

User-driven automation also comes with adjustable levers that allow for a finer balance between customization and efficiency. In the example above, most decisions are left to the sales rep, like which template to use and where the document goes after it's created. The tradeoff is extra time, clicks, and screens.

But the process could be configured so that when the rep clicks a button, a document template is automatically selected, generated, or even attached to a pre-filled email. The level of automation is up to business requirements.

User-driven document automation is a major improvement over manual work. It's great for fine-tuning workflows and simplifying processes.

However, it still relies on humans to make decisions and directly interact with the document automation solution.



# Process-driven automation

Process-driven document automation is a procedure that generates, delivers, and stores documents based on automated conditions. In most cases, users aren't required to interact with the solution; instead, documents are kicked off in the background as users work or as other processes change the state of the CRM (for example, update a field automatically).

Research shows it can take an average of 20 minutes to get back on track after being interrupted.<sup>5</sup> Process-driven document automation fully handles those document tasks or decisions that detract from value-adding work.

---

<sup>5</sup> No Task Left Behind? Examining the Nature of Fragmented Work





# Automated generation & delivery

Automatically ensuring the right document is created and delivered is the core of process-driven document automation. It's used across industries and departments to streamline tedious yet vital work.



**Steven Sales**

When a prospect is ready to review pricing, Steven advances the Opportunity stage in Salesforce. This causes S-Docs to generate and email a polished proposal to the prospect - leaving Steven time to continue building relationships and meeting his goals.



**Barry Borrower**

Barry logs into an insurance portal to apply for a loan, but as a busy professional, he doesn't have time to waste. Luckily, S-Docs generates the finalized application instantly and delivers it to Barry for his final signature just seconds after he clicks "Submit."



**Clara Contracts**

Another deal cycle is about to close, and the only thing left to do is seal it with a signature. Clara rests easy knowing that a contract is automatically sent when the deal is marked closed, containing pre-approved content blocks and all necessary information.

Whether triggered by related user actions or a scheduled process, fully automatic document generation and delivery can take teams from optimized to transformed.

# Automated document storage

Documents aren't always emailed or downloaded right away. When storage is required by internal or external policies, process-driven document automation can ensure documents get where they need to be.



## Hannah Human Resources

Hannah is required to save all performance review forms in SharePoint, but she has no time for sorting through file folder chaos. Luckily, S-Docs automatically sends these documents to the right folders every time they're generated.



## Oscar Operations

Oscar reviews monthly production reports with his team, but his many other duties make it challenging to repeatedly create and manage them. With S-Docs, the reports are automatically generated each month and waiting in their Google Drive production folder whenever Oscar needs them.

Process-driven document automation doesn't just help at the point of document creation. It can have a transformative effect on efficiency for document handling procedures downstream of generation.



# Bulk generation

While document automation provides the efficiency and productivity needed for scale, it also supports high-volume requirements that surface as an organization becomes more successful. Automatic bulk document processing can accomplish the work of hundreds of employees at once.



## Fernando Finance

Each month brings dozens of account renewals, meaning Fernando has stacks of invoices to manage. With S-Docs, invoices are scheduled to be automatically generated and emailed to customers with up-to-date pricing.



## Marcus Marketing

Marcus knows that physical media can stand out in a digital world. In just a few seconds, he uses S-Docs to generate hundreds of personalized invitations to his company's conference, along with mailing labels that can be printed for easy sending.



## Audrie Accounting

At the end of each year, Audrie is buried in financial analysis, but still needs to send tax information to employees. She uses S-Docs to generate and send all of the tax documentation at once, so she can focus on advancing the organization's financial health.

With process-driven automation, S-Docs takes the wheel when it comes to tedious document tasks that disrupt deep work, so your employees can achieve greater fulfillment, better serve your customers, and direct their full efforts toward achieving the organization's goals. However, it's essential to evaluate your operational readiness and ensure that your processes, people, and culture are aligned with the changes that come with embracing automation.

A statistical analysis of current S-Docs customers showed that process-driven document automation can deliver a

## **90%+ return on investment**

compared to user-driven document generation alone. Process-driven automation is the best choice for organizations looking to maximize efficiency and get the most out of their resources.

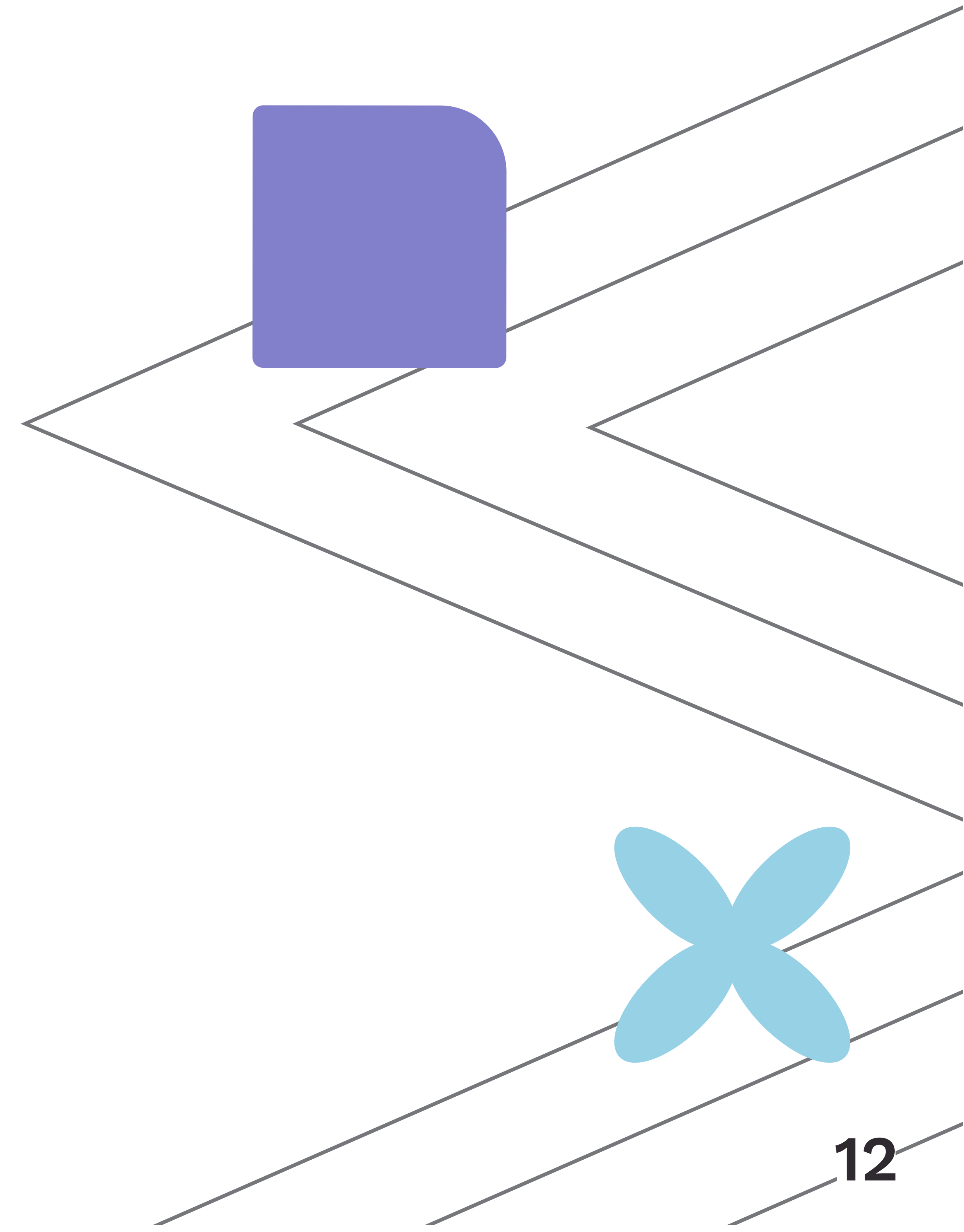




# Are you ready for document automation?

Even when the benefits are indisputable, they aren't necessarily guaranteed. Organizations must ensure they're well-positioned for a major change before acting on it. For example, you wouldn't implement a CRM without ensuring your team is adequately enabled, your data is properly organized for migration, and your processes are aligned to take full advantage of the system's capabilities.

The following five criteria will help you understand if you're a good candidate for process-driven document automation and all of the benefits that come with it.



# 1. You have clear reasons to automate

The motives for document automation can vary based on your organization's size, industry, or the specific workflows that make your business tick. But an analysis of current automation customers at S-Docs shows that common reasons include:



## **Cost savings:**

Process-driven document automation decreases the cost per document by as much as 90%.



## **Customer satisfaction:**

Customers value timely, error-free service, which document automation can provide when document delivery is part of your customers' experience.



## **Productivity:**

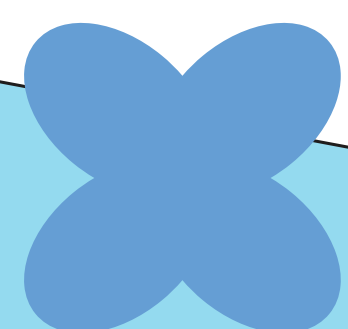
Automating crucial but tedious document tasks can give teams time back to focus on value-adding work and get more done with less.



## **Compliance:**

Highly regulated industries require the level of reproducibility, access control, and error reduction that comes with document automation.

Clear objectives are critical to keep you on track and ensure you're not embarking on a project that won't provide returns.





## 2. You understand your current processes

If you have a good grasp of why you want to automate, you should have an understanding of what your processes look like today (and where you want them to go). However, cataloging the workflows that power your business is still an important exercise for any organization that wants to employ document automation.

Knowing the specific steps your team takes will help orient you to what can and should be automated, as well as what user-driven engagements are important to retain. It will also help paint a broader picture of the opportunity that document automation creates, especially in areas that aren't as obvious.

For example, you may realize that one department is regularly performing actions that can be used to automatically kick off downstream document generation, even when those individuals don't handle documents at all. Or you may uncover employees that are regularly waiting excessive amounts of time to complete tasks due to document holdups upstream.

Overall, this is an important part of identifying the highest-impact processes to target for automation.







# 3. Your document processes are worth the automation investment

It might seem obvious, but it's an important question: is document automation worth it? The answer will be tied to your goals from criteria #1, but in general it can be helpful to reflect on the following, once you know what your processes are.

1

## Are your current processes costly?

That is, are you spending excessive time or money on them? Documents are highly variable assets, so putting them together manually is often a lengthy process. Does the cost of your human resources outweigh the investment in document automation?

2

## Are your current processes dependent on key staff?

A single document can depend on countless layers - template formatting, data inclusion, logic, approval processes, security, and more. Each of these may require involvement from key stakeholders, and they scale up as documents get more complex or regulated.

This can take time away from other value-adding work, as well as introduce excessive mental load on key employees that decreases the effectiveness of the time they do get to spend on other tasks.

Process-driven document automation has been shown to increase ROI by as much as 90% over user-driven document automation, but there are numerous ways that hard and soft ROI can make a document automation program worth it.

There are many ways to calculate whether your processes are worth automating. Ultimately, this exercise will help you tell the difference between nice-to-have and must-have.

## Hard ROI

Hard ROI can be directly measured. Gathering your baseline metrics, and comparing against projected improvements from document automation, can be critical. Some pieces to look at include:

- Time spent per document task
- Rate of document approval/rejection
- Remedial costs related to errors/delays
- Overall team output

## Soft ROI

Soft ROI consists of the intangible benefits that a document automation program can provide. These may not directly contribute to your bottom line, but they can certainly have an impact, and include:

- Customer satisfaction
- Supplier relations
- Employee satisfaction
- Company culture
- Brand reputation
- Team collaboration



# 4. Your processes can be automated

Not everything is possible to automate, and that's okay; in fact, the goal of process-driven document automation is to hand employees only those steps that require human judgment.

The following criteria can be used to determine if a document process is a good fit for automation.



## **The process is repeatable.**

This means that it's well-defined, consistent, and not excessively varied (although conditional logic makes it possible to automate fairly dynamic document tasks).



## **The process is frequently carried out.**

Best-fit documents for automation are created on a regular basis based on repeatable conditions.



## **The process relies on minimum human judgment.**

The best automated processes can mostly take the wheel so your users can be 100% present for any critical decisions.



## **Your data comes from a “source of truth.”**

A core function of document automation is putting your data exactly where it needs to be within your documents, so it's helpful when you use a system that your automation tool can reliably pull data from. It's also helpful when that “source of truth” is mostly complete and hygienic, but worry not - no CRM is perfect. Document automation tools have ways to diminish or avoid errors caused by incomplete or messy data.



## **You have appropriate safety nets and monitoring systems in place.**

Automating processes that were previously checked by humans can be daunting, since business logic can't always catch edge cases that your employees would be able to understand and correct. This makes it helpful to have quality checks in place that can be either translated to automation (like ensuring a document isn't missing data), or used to send in an employee when things don't look right.

All in all, document automation helps remove the many tedious, repeatable tasks that come with processing paperwork - and leaves your team with the most meaningful work.



## 5. Your culture is ready for document automation

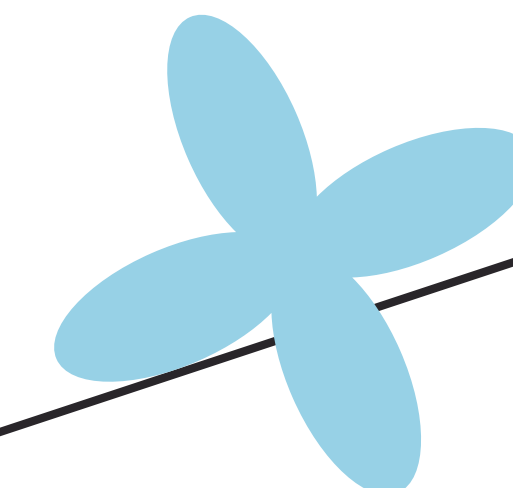
While “automation” may sound cold and technical, it’s really about enabling people - and people are what will ultimately make it work. Fostering a culture that knows the value of their time and embraces technology to help them be more productive is key to a successful implementation.

If business leaders have clear objectives for a document automation program (criteria #1), understand the process changes that will be made (criteria #2), and know why it’s worth it (criteria #3), they’ll be in the best position to articulate the positive impact to employees.

### Change management is key

Change can be challenging, especially when it comes to processes that have been set in stone for some time. It’s understandable that users may not welcome a disruption to their day-to-day work life, even if it promises more exciting, meaningful work.

Solid change management procedures are critical to ensure users fully adopt new processes and enable the business to achieve its full ROI. While every organization is different, you should think about these key points:





## 1. Change starts at the top

Addressing concerns from the C-suite and getting buy-in early will ensure leadership is on board and willing to set an example for the entire organization.

If you've gone through the exercise to address your readiness for document automation, you'll be well-positioned to illustrate the program and its benefits.

## 2. Communicate with employees

Open lines of communication with employees are vital to successful process changes. This can help explain the benefits, address concerns, and solicit feedback. Teams will be much more engaged when they have the opportunity to offer their perspective throughout the process.

## 3. Prioritize training & enablement

Employees should be well-versed in process changes and what they mean for their individual work. Putting an emphasis on training can ensure process adoption, dispel doubts, and further engage employees.

## 4. Introduce gradual evolution

Too many sweeping changes at once can overwhelm teams and stall progress. But document automation isn't a one-size-fits-all solution, and it puts you in a good position to slowly phase in efficiency-enhancing automations without overhauling processes overnight.

## 5. Performance-monitoring and feedback

When assessing your organization's readiness for automation, criteria #1 involves creating specific goals. Monitoring this progress, along with soliciting employee feedback throughout implementation, allows you to iterate, improve, and ensure ongoing success.

Document automation will only be successful if your most important asset - your employees - embrace the change. It might require work upfront to achieve this, but once you do, the benefits will sell themselves.

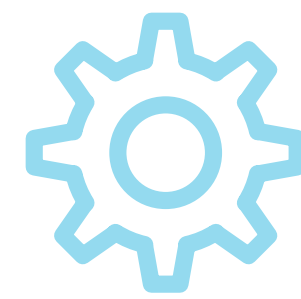




# The power of document automation

From tax forms to business proposals, documents vary widely. But they're united by their essential role and the extensive effort required to produce them. Automating your documents can unlock potential across many different areas of business.

The following represents just a few ways document automation can transform your operations, but the full list extends far beyond these pages.



## Increase efficiency

Time is a non-renewable resource. Enhancing the way it's spent is one of the biggest wins an organization can achieve. Document automation gives this resource back to employees and allows them to get more out of their hours at work.

By removing the physical work and the mental load of paperwork tasks, along with decreasing the error rate and time needed for corrections, document automation helps organizations build efficient, focused workforces.



## Boost productivity

Whether their primary job function involves paperwork or not, document automation enables every team to get more done.

When documents are created and distributed automatically, document-dependent tasks can be completed much quicker and more frequently - such as account onboarding after a contract is signed.

Document automation also enables key employees with the time they need to focus on maximizing their output and delivering higher quality work.



## Enhance customer experiences

Anything that improves team productivity can easily translate into better customer experiences. Document automation frees employees to focus on building relationships and providing personalized service.

However, document automation can also have a direct impact on your customers' experience. By automating the generation and delivery of customer-facing documents like quotes, invoices, and other communications, you ensure customers always receive timely, on-brand, error-free documents.





## Increase compliance

Document automation doesn't just move the needle on efficiency and productivity. For organizations that must create documents for regulatory purposes, or that process sensitive data, automation can be key to compliance.

When you use repeatable, standardized processes to automatically create documents, you ensure that each document follows the same rules, contains required content, and gets delivered where it needs to be. Document automation also significantly reduces the chance for compliance mistakes related to human error, as well as guarantees that only those with proper permissions can access sensitive documents.



## Achieve ROI & cost savings

S-Docs analyzed a series of customers that moved from user-driven to process-driven automation, and found that their ROI increased by 90% on average. This figure doesn't take into account intangible benefits and components of soft ROI that often accompany a hard savings rate.

Automating (and digitizing) document processes can help you save significantly on paperwork-related costs and employee hours that would otherwise be wasted.



## Scale

For growing businesses, manual processes won't be sustainable for long. Document automation isn't a nice-to-have as you scale - it's a necessity to ensure you can keep up with growing demands.

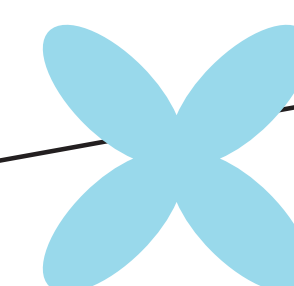
Document requirements only get more complex as you grow. Automation is key to managing these demands effectively - and offering a fulfilling environment for the best talent to dedicate their efforts.

# Which documents should you automate?

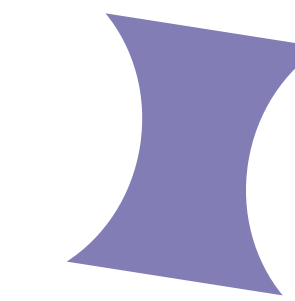
While it would be nice to automate every document you'll ever have to work with, that's not feasible or advisable. We've found that the best candidates for automation are documents that:

- Are created frequently on a regular schedule
- Take lots of time to put together manually
- Require little to medium amounts of customization
- Use data housed in a single source of truth

These types of documents can provide the highest ROI when they're automated because they're usually mission-critical, easier to set up, and save the most time for your team in the long run. Here are a few common documents that S-Docs customers automate.







# Business proposals & quotes

Proposals and quotes are staples for any sales team. Organized and well-designed proposals leave prospects with a clear sense of your organization's benefits, as well as what you bring to the table over the competition.

But sales documents like these require a lot of precise data. Up-to-date pricing, terms, and customer details need to be correct and complete - and branding needs to be current to make a good impression. Sales reps don't have the time to craft consistent proposals that are effective.

Document automation helps deliver great experiences during this critical time in the deal cycle by delivering accurate proposals at the exact right time. Plus, it gives reps time to focus on building personal connections.

Automated proposals can be especially effective for organizations with complex products, multiple brands, or customers across geographies. **Accor**, a European leader in hospitality, struggled to manage proposal processes across 5,500 properties and 110 countries. With the help of S-Docs, Accor can now automatically create quotes and proposals customized by location, hotel brand, language, and more - turning hours of work into minutes.





# Contracts & agreements

Contracts solidify important agreements and protect the interests of your organization, meaning the stakes are high when it comes to creating and distributing them.

While no contracting process will be absent from humans, automation can ensure that those steps that don't require an employee's judgment are done correctly every time. For such high-frequency, high-value documents, offloading unnecessary cognitive burdens from the process can help key employees make better decisions and be more effective.

Document automation can ensure that contracts contain all necessary data, including complex sections that only apply in certain situations. For example, if an extra clause is needed for a client in a specific state, this logic can be easily processed - keeping you compliant with no risk for human error.

It can also route contracts to the appropriate parties for approval automatically, enabling legal teams to work more efficiently and deals to flow more seamlessly.





# Customer correspondence

Customer communication takes numerous forms - account information, complaint responses, invitations, and more - but it's key to maintaining positive relationships and a good reputation in your industry.

Depending on the type of communication, however, managing a system for getting personalized documents to customers in a timely manner can be incredibly tedious and time-consuming. Automating your customer-facing communications can help save employee time and build customer loyalty.

**Florida Prepaid**, a provider of college savings plans, grappled with a manual, reactive correspondence process that sometimes had customers waiting days to receive documents they'd requested. With the help of S-Docs, their customers can now automatically receive account statements, tax information, and more when they transact with their data online. This greatly optimizes the way employees work, and simplifies the way customers access necessary documents.

Your most impactful documents will depend on your specific processes. If you use the steps in this guide to critically evaluate how ready you are for automation, you'll better identify which documents can make the biggest improvements to your operations.





# Transform your operations with S-Docs document automation



Document automation can play a major role in creating a more efficient and productive future for your organization. If you're feeling pressure to streamline operations and do more with less, S-Docs is here to help.

We've helped teams of all sizes evaluate their processes and design automation plans specifically tailored to exceed goals and solve emerging challenges. Our document automation and e-signature solutions have saved countless hours and revolutionized the way work gets done for thousands of organizations. We're dedicated to partnering with you to empower your organization to be the best it can be.

Reach out to our team at **[sales@sdocs.com](mailto:sales@sdocs.com)** to get expert insight into how S-Docs can take your processes to the next level, transform customer and employee experiences, and accelerate business success.

