

A decorative graphic consisting of a series of colored squares (blue, purple, red) arranged in a descending staircase pattern on the left side of the page.

# THE ROAD TO DIGITAL TRANSFORMATION

A Simple Guide To a Not-So-Simple Topic



**A**s businesses increasingly look to digital solutions to help them operate more efficiently, improve productivity and cut costs, those that fail to make digital initiatives a priority risk falling behind.

An inherently complex topic, the notion of “digital transformation” often feels overwhelming. More than simply swapping out paper with digital files – although that’s where it begins – digital transformation is considered a multi-step process with no real finish line. Rather, companies move through the various stages of digitization and digitalization before reaching digital transformation – and then continue evolving and optimizing on an ongoing basis.

We’ve created this simple guide as a sort of “cheat sheet” intended to help our clients better understand the process and navigate some of the key issues they’ll face at each stage. Inside, you’ll find a concise explanation of each of the three phases of digital transformation, an example of how GRM has guided a client through that particular stage, and some considerations that might prove helpful as you participate in guiding your company through important digital initiatives.

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# DIGITIZATION

**DEFINITION: CONVERTING PAPER DOCUMENTS AND FILES INTO DIGITAL FORMAT**

## CASE STUDY: DELIVERING SAVINGS FOR FOODSERVICE PRODUCE DISTRIBUTOR

Our client, North America's largest wholly owned and operated foodservice produce distributor, relied on manual processes for their accounts receivable operations, including the delivery of invoices.

With multiple regional distribution centers, the company generated paper invoices for accounts receivable at each center. Invoices were then paired with produce shipments and delivered by truck to each customer. These processes were error-prone and inefficient.

With GRM's help, the client digitized their operations. We implemented document imaging and document web hosting, and created a streamlined process where documents were sent to our centralized imaging center, scanned, and then uploaded and stored in VisualVault, our cloud-based content platform.

The result? Beyond reducing the costs and time specifically associated with processing and delivering paper invoices, our client also realized cost savings by virtue of reallocating human resources to other functions. The transition from paper to digital also increased the accessibility of files, improving our client's overall efficiency.

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Reducing the costs and time specifically associated with processing and delivering paper invoices.

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### WHAT TO CONSIDER:



If your company relies on paper documents but is ready to start on the path to digital transformation, the first step is to digitize your existing, important documents. Since this typically means converting a large quantity of paper documents to digital format, here are a few important factors to consider:

**Pricing** – Beyond taking the standard step of considering bulk pricing on scanning, you should also consider the cost implications of your digitized documents being stored on a hard drive. Opting for cloud storage will spread the cost out over time rather than incurring a one-time fee.

**Storage** – How will you access your documents once they're scanned? While storing documents on a hard drive or flash drive are viable options, they're not nearly as convenient and efficient as cloud storage. Hard drives can become corrupted; flash drives are easily misplaced. A secure, cloud-based document repository ensures that multiple parties can access documents whenever and wherever necessary.

**Advanced Technologies** – Choose a digitization partner that uses both Optical Character Recognition (OCR) which reads printed text and Intelligent Character Recognition (ICR) software which recognizes handwritten text, and a range of font styles. This ensures that documents are searchable and that critical data can be extracted, and that metadata can be associated, which helps with indexing and searching.

# DIGITALIZATION

**DEFINITION:** USING DIGITAL FILES TO MAKE MANUAL PROCESSES MORE EFFICIENT

## CASE STUDY: IMPLEMENTING WORKFLOW MANAGEMENT FOR PATHOLOGY LABS AND HEALTH SYSTEMS

Our client, one of the largest pathology lab operations in the country – responsible for performing nearly a quarter of a million lab tests per year – required a digital solution to streamline and manage their lab requisition and fulfillment process.

The client's existing process involved paper lab requisitions physically connected to pathology samples as they were routed through the multi-building testing process. As paperwork and samples were transported around medical campuses via courier, the paperwork could not always be accessed by medical personnel when they needed it. These inefficiencies not only negatively impacted operations and finances; they also negatively impacted patient care.

GRM digitalized the client's pathology lab processes, replacing paper lab requisitions with digital requisitions. While paper lab requisitions are often misapplied, damaged or lost, using digital lab requisitions decreases the likelihood of these errors. Digital lab requisitions also significantly decrease the need for the manual collection, sorting and input of data into IT systems, greatly reducing clerical errors.

And, unlike paper lab requisitions which physically accompany pathology samples at all times, digital requisitions can move independently of the pathology samples.

Accelerated our client's laboratory processes, resulted in fewer errors, improved patient care.

Using our digital pathology solution, lab requisitions were immediately entered into VisualVault, our cloud-based content management platform. Those requisitions could then be accessed securely by multiple parties in multiple locations, including via mobile.

At the same time, pathology samples continued moving through the lab, with status and results added to the lab requisition in the cloud and immediately accessible to necessary parties.

Overall, GRM's solution accelerated our client's laboratory processes, resulted in fewer errors, improved patient care and saved the client hundreds of thousands of dollars per year on lab operations alone.

### WHAT TO CONSIDER:



If your company's documents are already digitized, it's time to put them to use and extract the greatest value from them. Document management software can help, especially if it delivers:

**Improved Capabilities** – The features and benefits of document management software vary, so be sure to choose software that allows you to save files directly to the cloud platform or your hard drive. You should also have the ability to complete documents using e-signature functionality.

**Enhanced Collaboration** – Choose software that is more than a simple repository to store your digital documents. Faster and more secure than email attachments, document management software can facilitate collaboration by making it easier to share documents with colleagues, clients and vendors via permission-based access.

**Security** – Be sure the software provider you select follows the latest cyber security protocols. This includes end-to-end data encryption, adherence to Safe Harbor and PCI regulations, and compliance with SOC 2 requirements. Also, look for a provider that includes software security updates in the contract, ensuring you aren't charged a separate fee for every security upgrade.

# DIGITAL TRANSFORMATION

**DEFINITION:** LEVERAGING TECHNOLOGY TO REDEFINE AND DRIVE THE WAY A COMPANY DOES BUSINESS

## CASE STUDY: REINVENTING CLAIM SUBMISSIONS FOR PHYSICIAN SERVICES COMPANY

Recently, GRM successfully guided a large physician services company along the digital transformation continuum, optimizing the company's patient chart acquisition and verification process and saving them millions of dollars.

The company, which provides physician services to more than 1,800 clinical departments in healthcare facilities nationwide, processed thousands of patient records daily using manual processes. The goal was to ensure patient charts were complete so claims could be submitted to insurance companies for reimbursement, but reliance on manual processes proved to be laborious.

These processes included healthcare personnel filling out patient charts by hand and those documents being shipped to processing centers for scanning. Often, missing or incorrect information wasn't discovered until late in the process, extending a timeline that already took an average of 21 days to complete. As a result, the company experienced significant Days Sales Outstanding (DSO) and a high number of Timely Filing Denials, creating a substantial loss of revenue.

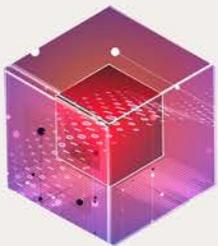
GRM's solution took them through the entire continuum of digital transformation – from digitizing their backlog of existing documents to digitalizing processes. And, they ultimately employed our cloud-based content services platform as the centerpiece of a radical business process transformation.

## Reducing their Days Sales Outstanding by up to 65%

Our Chart Acquisition and Verification Solution streamlined the claim submission and payment processes, leveraging the power of our cloud platform to deliver business process automation and crucial, real-time insights via advanced analytics.

This solution revolutionized the company's operations, reducing their DSO by up to 65% and dramatically decreasing their Timely Filing Denials – saving the company millions of dollars.

### WHAT TO CONSIDER:



A key element in successfully navigating the continuum of digital transformation is the implementation of a content services platform. Cloud content platforms – which deliver crucial advantages such as scalability, ease of deployment, and automatic software updates – are often the best choice. Look for one that supports:

**Optimization of Business Processes** – The ability to automate processes, thereby maximizing efficiency and eliminating the errors associated with manual data entry, is vital to digital transformation.

**Seamless Integration** – Choose a platform that integrates with your current system (EMR, HRIS, etc.), protects your existing software investment and allows you to continue using the interface you know – all while providing enhanced security, expanded capabilities, and improved access to data.

**Advanced Analytics** – Gain business insights via automatic, real-time notifications, ensuring you don't miss any opportunities and can proactively respond to potential problems.

## CONSULT WITH GRM TODAY

Wherever your business is on its digital transformation journey, GRM is uniquely equipped to help.

We guide companies through every stage of digital transformation, ensuring they are well-positioned for dramatic progress associated with their digital initiatives.

## YOUR BUSINESS IS UNIQUE. SO ARE OUR SOLUTIONS.

We consult with our clients to fully understand their needs and goals before helping them develop a digital strategy that makes sense for them. We then leverage our knowledge and experience – as well as our technology and infrastructure – to enable their successful digital transformation.

Since your company already works with GRM, please take advantage of our expertise. We'd love to be part of the next conversation your company has regarding digital transformation – or we can set up a consultation.

To schedule a free consultation, contact our digital transformation expert:

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