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LIFEHACKS OF A C-LEVEL
HIGH-LEVEL ANALYTICS, INTEGRATED SYSTEMS, AND OTHER TOOLS TO HELP EXECS GET BETTER, FASTER RESULTS

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LIFEHACKS OF A **C-LEVEL**

If C-suite executives have anything in common, across all industries, it's this: They're BUSY! Whether you're in the seat of CFO, COO, CIO, or CEO, being a C-level is more than a full-time, 40-hours-per-week job. There's no clocking out, and there's no slowing down.

Surely, you can relate to this quote from the CEO of Fortune's Most Admired Company in the Packaging Industry:

> **"The good thing about the weekend is that you can spend quality time working."**
> *Jerome Peribere, President and CEO of Sealed Air Corporation*

It's not an ideal way to spend a weekend, but it's also not uncommon. Take a look at how many hours are being clocked by you and your peers:

- According to [Business Careers Guide](#), many **CFOs work up to 80 hours per week!**
- *Time* reports that **CEOs average around 10-11 hours per day plus an additional 6 hours over the weekend.**
- On weekdays, executives **spend an estimated 82% of their time connected to work.** ([Harvard Business Review](#))

CFOs WORK UP TO 80 HOURS PER WEEK

EXECUTIVES SPEND AN ESTIMATED 82% OF THEIR TIME CONNECTED TO WORK

This kind of dedication is rare and admirable. Our hope is that this guide will help you, as a C-level, to get more accomplished in your workday, whether you're clocking 8 hours or 16.

These lifehacks can help you make every minute count, by automating and simplifying where possible. Reclaim your weekends, reduce your stress, and get better, faster results with these C-suite strategies!

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SPOTLIGHT ON: **CEOs**

You've been on the road for business, and you come back to find a pile of forms that need to be signed off on. In your briefcase, you've got a wad of receipts that need to be submitted for an expense report. Sound familiar?

Here are some ways to minimize the disconnect and backlog that can be caused by business trips.

Always Stay Connected with On-the-Go Capture & Approvals

Advanced Mobile Capture

Do you feel like you're spending way too much time on travel expense reports? You are! Americans spend over **3 billion dollars** per year on business travel, logging over **450 million trips**. (ustravel.org) These expenses can be difficult to manage if you don't have a good system in place.

Keep up with your receipts and other records from your trip by capturing the data as you receive it. Use mobile capture directly from your smart phone to submit your receipts to your automated accounting platform.

80% of business-to-business decisions require executive signoff. (CMO.com)

Americans spend over $3 BILLION per year on business travel

Online Approvals

How many things do you have to approve each day? When you leave the office, do you have a sinking feeling that when you return, there's going to be a collection of forms waiting for your signoff?

Don't want until you get back to the office to take care of approvals. With an automation platform, you can log in from anywhere with an internet connection, review submissions, and sign documents electronically. The system can even send you an automated notification when there are tasks for you to complete. That way, with a few quick clicks, you're caught up with your work, rather than having to come back to a backlog when you return to the office.

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## Automate Reminders So Nothing Falls Through the Cracks

How many reminder emails do you send or receive throughout an average week?

The CEO of Simple Mills reports that he sends over **12,000 emails per year.** (Inc.com) If it takes 5 minutes to send each email, that's 60,000 minutes (or 1,000 hours) spent emailing each year!

Many of these emails can be automated by using a workflow automation platform.

Here's how: You can use your workflow software's work queue to keep track of everything outstanding, and train the system to send out reminders when tasks aren't completed, alleviating yourself from having to endlessly follow up with your staff.

What's more, the system will allow you to view a detailed account of each task's history, including any previous steps of the process you need to know about.
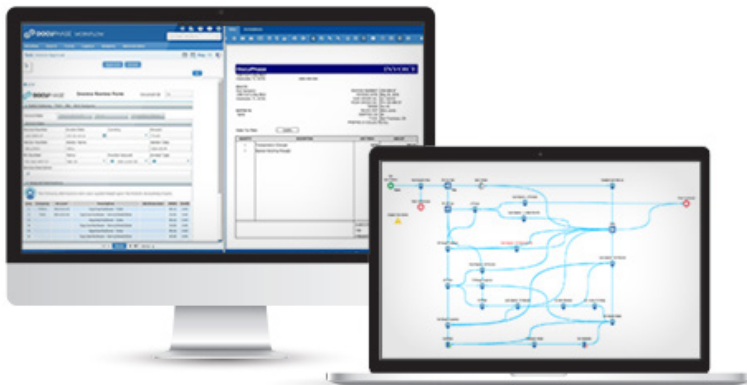
Use a workflow automation platform to automate email notifications.

LEARN MORE

Case Study

Operation Par, a leading provider of integrated addiction and mental health services, partnered with DocuPhase to implement a process improvement solution. Here's what their C-Suite had to say about the changes:

"I no longer worry about my requests getting to the right people in time, or the need to be at my desk to sign off on urgent purchases."
- Jim Miller, CIO, Operation PAR

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SPOTLIGHT ON: **COOs**

As a COO, you've got to have a handle on all operations across your organization. That includes everything from overseeing the work of executive and middle management, to establishing your company's culture and vision, and driving sustainable growth.

How can one man or woman manage such a broad range of responsibilities? It's no simple task.

Here are some pointers for managing all of the data and responsibilities you've got on your plate.

View High-Level Analytics on One Centralized Dashboard

An Enterprise Automation Platform like DocuPhase can give you visibility across your organization's processes. See a broad overview, or drill down into specifics like how long each task is taking, which person is performing each assignment, and which process steps are sticking points.

Analytics can help you:

- Determine where your budget is going
- Decide when resources should be reassigned
- Understand where your processes are bottlenecking
- Infer how to make your organization more cost-effective

Speaking of data, do you know how other execs measure their success? Check out this Forbes article to see what other business leaders aspire to: 7 Metrics for Successful Leaders – How Do You Measure Up?

330% Increase in Patient Volume

A Florida-based HME Company saw a **260% increase in productivity and a 330% increase in patient volume** – without the need for additional overhead. They also saw a **75% reduction in costs** when implementing document management software.

VIEW THE CASE STUDY

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Correct Your Documentation and Filing Errors

What's your confidence level in your filing system?

Here are some shocking stats:

- 7.5% of documents get lost
- 3% of documents get misfiled
- On average, each document is copied 19 times
- The number of paper documents in the US is growing at a rate of 22% per year
- Professionals spend up to 50% of their time looking for information

If you've got a paper-based system, your team probably runs into issues where the files that they need to access are:

- Misfiled
- Checked out to another user
- Incomplete

A Document Management System can resolve all of these issues. Electronic files can be shifted back into the places where they belong. Best of all, all of this re-filing can be achieved through bulk edits and automation, rather than corrected one-by-one like you'd have to do with paper-based files.

THE NUMBER OF PAPER DOCUMENTS IN THE US IS GROWING AT A RATE OF 22% PER YEAR

Case Study

When one Insurance Company discovered a problem with misfiled documentation resulting in incomplete work items, the DocuPhase team was able to write a PowerShell script that automated the corrections that the company needed to make to their virtual filing cabinets. Rather than finding one document at a time and refiling it in the proper place manually, the company could call the corrective script from within their workflow system and initiate importing the document and its metadata to the correct virtual cabinet.

VIEW OTHER CASE STUDIES

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SPOTLIGHT ON: **CFOs**

Accounting responsibilities, cash management, and risk assessments are all managed by you, the CFO. You're the Chief responsible for managing all of the finance department, whether directly or as the top tier over the Accounting Manager and/or Controller.

Your role is a numbers game, and to win the game, you've got to know the rules and have a strategy in place. Check out these tips that can help you navigate your organization's finances with ease.

Automate Your AP Process with These 5 AP Automation Tools

1. **Alerts** – notify your team members when they need to perform a task or when a file is received

2. **Data Entry** – OCR technology enters data for you, saving you a ton of time and frustration, and eliminating human errors

3. **3-Way Matching** – automate the tedious task of matching data across forms and databases

4. **Data Sync** – integrate your automation platform with your existing software so that you can push and pull data, keeping all of your information in sync and up-to-date across your organization

5. **Email Fetch** – use RPA tools to patrol your email inbox for specific messages and attachments that should be added to your virtual filing cabinets

These tools can work together to help you and your team manage your daily responsibilities with ease.

Case Study

After implementing the DocuPhase Accounting Automation solution, Alimera Sciences, a pharmaceutical company, saw a 93% reduction in invoice processing time.

"[Our AP Clerk] has found that the program itself has been somewhat of a God-send in the fact that it's lessened her workload tremendously. To have parties coming to me saying, 'We can do more work,' has given us the ability to complete other tasks that we hadn't been able to do before."
- Phil Jones, CFO, Alimera Sciences

VIEW THE CASE STUDY

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Make Approvals, Straight from Your Email

What's your current process for issuing approvals? Is it automated? Is there an easy-to-access audit trail? If not, here's another lifehack you might like: DocuPhase lets you make approvals straight from your email client, without having to return to the office or log in to the workflow website.

Real-World Scenario:

One of the good things about workflow automation software is that it allows you to make approvals online from any location. First, you get an email letting you know something needs to be reviewed, and then you log into the

system to check it out. Once you click Approve or Disapprove, your decision is tracked, and the item moves along to its next step in the workflow.

After using this functionality for a period of time, many users asked the same question: Is it possible for me to do this straight from my email, without having to log in to my work queue?

The answer is Yes!

Users of DocuPhase are able to perform mobile approvals, and they can view all of the pertinent information needed to make a decision right from their email.

WHAT IS ACCOUNTING AUTOMATION?

LEARN THE BASICS BEHIND ROBOTIC ACCOUNTING AUTOMATION, THE POTENTIAL FOR OFFICE INNOVATION

Robotic Accounting Automation is changing the way businesses operate in the 21st century.

In this white paper, you will learn about:

- The history and evolution of RAA
- How to build your virtual workforce of Bots
- Real live results of utilizing RAA

Download your free copy of this white paper now to start learning about how Robotic Accounting Automation can help your business.

What is Robotic Accounting Automation?

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SPOTLIGHT ON: **CIOs**

Your role as a CIO is ever-changing, as technology evolves. Not only do you have to stay abreast of new developments in your field, but you've also got to keep your team engaged and encouraged, as they perform key roles as IT support staff and programmers.

If you're keeping your eye out for easier ways for your organization to accomplish everyday tasks, consider how these 2 lifehacks can transform your workplace.

Integrate Your Systems

System integration is when your databases are linked up, and you can push and pull information between systems.

When you've got a DMS (Document Management System) in place, you'll be able to seamlessly integrate all of the data associated with your documents, with the data found within your other systems – whether you're using payroll processing software, accounting software, or home-grown programs.

You'll be able to do these things:

- Sync all of your programs so they can speak to each other in real time
- Wipe out the need for double or triple entry within multiple programs
- Allow for a simplified workplace process with uncomplicated access options

What system would you want to integrate with? If you've got a data integration expert at your fingertips (click here to meet with one), the sky's the limit. Here at DocuPhase, our integration experts have created connections between our platform and Microsoft GP, NAV, SL, Outlook, QuickBooks, Oracle, Sage, SAP, NetSuite, and Salesforce, and they regularly add to that list.

Case Study

When Forsyth County Sheriff's Office was seeking out a Document Management System, they needed a platform that would integrate with Sungard, their public safety software. DocuPhase built a custom integration that connected their existing software with the DocuPhase platform, seamlessly syncing data and documents, countywide.

VIEW THE CASE STUDY

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Get the Platform That Can Replace a Dozen Others

Today's software vendors offer solutions for just about anything your business needs. The problem starts to develop when a company has acquired too many of these single-purpose solutions, and the investment and administrative responsibilities begin to add up. It becomes a lot for the CIO to manage, and training is a beast because there are so many systems to learn to use.

What's the alternative? An Enterprise Automation Platform.

An EAP like DocuPhase can be used across all departments, managing the mission-critical processes throughout your entire organization. You'll get:

- Fully integrated data
- Consistent support
- Simplified training
- Better inter-office communication
- Limitless growth of your initial investment

To find out more about the DocuPhase Enterprise Automation Platform, download our whitepaper, Enterprise Automation vs. Point Solutions.

Document Management
Go paperless and increase efficiency with document management software

Web Forms
Collect information externally and connect your company internally

BPM Workflow
Take control of your business processes with workflow automation software

Data Capture
Efficiently and easily convert the data needed to power your business processes

System Integration
Integrate with your existing systems to keep your data accurate and up to date

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LOOKING FOR MORE HACKS?

Don't continue doing things the hard way. Technology has too much to offer for you not to take advantage of it.

See a problem? Identify it, and then fix it!

Follow this process to create your own hacks.

Step One: Identify the Problem	Step Two: Fix It!
Lack of Communication? ⟶	Full Visibility and Automated Notifications
Paper Overload? ⟶	Robust Document Management
Duplicate Data Entry? ⟶	Database Integration and Sync
Unnecessary Printing and Scanning? ⟶	Advanced OCR Data Capture
Excessive Filing? ⟶	Automated Filing and Indexing
Redundancies? ⟶	Work Item Audit Trail
Tedious Work? ⟶	Automated Data Entry
Lack of Accountability? ⟶	Audit Trail and Analytics
Inconsistent or Outdated Data? ⟶	Data Sync Across Systems
Repetitive Email Reminders? ⟶	Automated Email Notifications
Incomplete/Missing Files? ⟶	Document Wait Tasks

Talk to an expert to find out how Enterprise Automation can address your specific problems.

TALK TO AN EXPERT

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Banking/Finance	Education
Insurance	Property Management
Manufacturing	Construction
PEO/HRO/BPO/Staffing	Non-Profit/NGO
State and Local Government	Oil and Gas
Engineering	Transportation/Railroad
Information Technology	Utilities
Hospitality	And more...
Legal	

DEPARTMENTAL OPERATIONS - HOW OTHERS USE AUTOMATION

Approval Processes	Funding
AR/AP/Billing	Claims Processing
Purchase Request/PO Generation	On-Site Inspection/Data Collection
Invoice Approval Processing	New Patient Enrollment
Case Management and Escalation	Patient Record Management
Credit and Collections	Medicaid/Medicare Billing and Resubmission
Expense Report Processing	Contracts Management
Travel Request and Approvals	Knowledge Base Management
Auditing/Compliance	Training/Licensing/Certification Renewal
Automated Data Collection, Extraction, and Entry	Processing
Website Interaction Robots – Gather or Enter Data	Status and Information Change Processing
Recruiting and Selection	License/Certification Renewal Processing
Employee File Management	Custom Design/Engineering Review
HR Onboarding/Application Processing	Customer Service
Certification Validation/Enforcement/Renewal	Order Processing and Fulfillment
Performance Review	Support Case Escalations
Title and Loan Processing	Client/Vendor Self-Service
Enrollment	Customer Success Dashboards
Application Review	Project Management
Underwriting	Portals

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