# The CIO's Guide to
# Digital Transformation and Automation

# The Changing Role of the CIO:
## Driver of Innovation and Automation

The world is transforming at an ever increasing pace, and so is the role of CIO. In fact, 95% of CIOs agree that their responsibilities are changing as a result of world-wide digital transformation and the focus on automation.

Today's CIOs must go beyond means, methods, machines and the limits of their current systems and applications. They must be a transformative leader with a keen understanding of the business, focused on strategy and innovation. As a part of the executive team, the CIO should be viewed as the Chief Innovation Officer. The Chief Innovation Officer helps to build the strategy of the business, leads change, and translates tech capabilities to provide a foundation for growth. They are the digital partner of the leadership team driven by outcomes, impact and value.

The CIO is the solution to meeting the demands of having fewer resources to get the job done. They continuously evaluate new technology because they know that technology is the strategic driver for company growth. The CIO is now a story teller, advocate and enabler that puts IT in the terms of the business so they can see the technology vision for their future.

The everyday reality of the CIO is, they are the center of critical strategic efforts to improve operations, productivity and compliance, using new technology. They must first deliver core capabilities or they will not have the credibility to deliver innovation. These demands are forcing them to examine the strategic goals of their organization to insure they are leveraging digital transformation and automation to dramatically improve the way work gets done. The CIO is squeezing out every bit of capacity by going after the traditional things, automating them and putting the organization on autopilot. They make the hard decisions required to get there so they free capacity, time and money, giving their company a competitive advantage.

The CIO's team must have the ability to rapidly adapt to new technology and they need to reach beyond the walls of their company to partners that can help accelerate their education and implementations. They need to facilitate a partnership with their user community to understand the demands of daily production, in order to create platforms that produce good outcomes and are deployed successfully with high adoption. Every IT professional is an Innovation Technologist. They gain new skills and adopt new platforms with the understanding of the needs of their user community so they close the gap between expectation and realization.

The CIO is the transformational leader of the executive team, with their understanding of what technology can and cannot do, what is appropriate for their business, what is going to add value and where are it can be used to provide the greatest value, impact, outcomes and return.

As the Innovation enabler, the CIO will execute an aligned approach, manage a strong empathetic team, select the right partners and focus on digital transformation and automation to quickly help the business reach their most challenging goals and eliminate the biggest roadblocks.
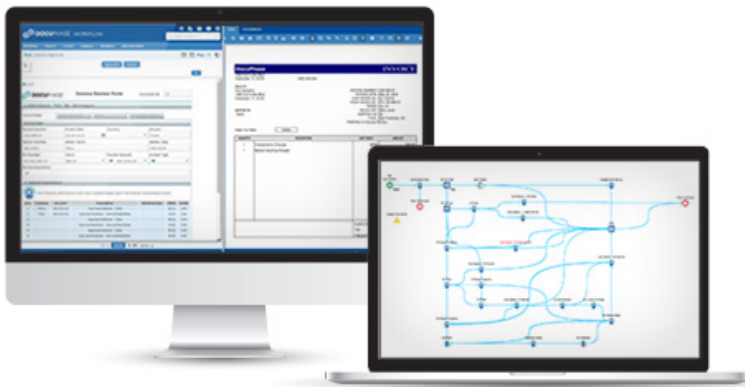
## Use a workflow automation platform to automate email notifications.

LEARN MORE

# Do More with DocuPhase

DocuPhase is the only Enterprise Automation Platform you need to transform how you get work done, creating a team that is more productive, effective, and agile. Our unified solution provides tools for information management and robotic process automation, allowing you to connect your departments and manage your enterprise. For more information, visit **docuphase.com**.

# The CIO's #1 Initiative:
## Creating Capacity for Growth

In a recent survey, **58% of CIOs declared that creating capacity for growth is their #1 business priority.** While each organization is unique, this common thread is building amongst CIOs worldwide and putting greater demand on finding technology based solutions to help.

In order to create capacity for your organization's growth, you must first establish a platform for growth. This platform will unify your systems, applications, and tools by effectively operating seamlessly together, eliminating mundane operations and aiding your workforce, in order to maximize productivity. The platform provides core functional tools such as Document Management, Web Forms, Workflow, RPA, Integration, Analytics and Data Management that can be leveraged across all departments and implemented to complement any core applications.

### THE STARTING LINE
Figure out where to begin your digital transformation by identifying your greatest opportunity. Many organizations start in the accounting department and expand from there.

### FOCUS ON PROCESS IMPROVEMENT
Your current processes are strained today. What will happen when you grow? As you review your processes, ask yourself, "What can be automated and how will it propel growth?"

### PROCESS MAPPING
Only 4% of organizations actually measure and manage their processes. Learn how having a greater focus on process details leads to a more effective organization.

I CAN FINALLY FORGET ABOUT USING INTEROFFICE MAIL FOR DELIVERING MY INVOICES AND PURCHASE REQUESTS TO THE RIGHT PEOPLE. THE SYSTEM DOES THAT FOR ME.

**CIO**
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# CIO's Checklist:
## Meeting the Goals of a New Era

Digital Transformation is a continual journey and the demands on the CIO are considerable. Immediate and long-term goals, strategy, blue-sky thinking, competition, the impact of technology and changing customer needs must all be deliberated and coalesced into a grand plan. As a CIO and leader of your organization, you will have to continually review, rationalize and adjust your vision often pivoting to meet changing requirements. While you may feel like you're trekking through uncharted territory, CIOs across the world actually share the same challenges and goals as you.

## Discover New Opportunity

**Review current programs to ensure alignment with strategic goals.**

✔ Can new platforms eliminate or augment current efforts?

✔ How can new platforms aid our workforce?

✔ What tasks should be eliminated using technology?

✔ How can we better engage with our customers and vendors?

✔ How do we minimize the impact of change and drive adoption?

✔ Can we fundamentally change how work gets done?

✔ What hidden value can we discover?

## Create a Clear Vision

**Map out the technology future of the company.**

✔ How does it increase competitiveness?

✔ How does it help the workforce?

✔ How does it help management?

✔ How does it help clients and vendors?

✔ How does it adapt to changing requirements?

✔ How does it generate value?

Are you ready for automation? Schedule a meeting with one of our automation experts to see if an **Enterprise Automation Platform** is right for you!

**SCHEDULE A MEETING**

# Apply Digital Transformation

**Gain the advantages of increased capacity, transparency, and agility.**

✔ Are we truly paperless yet?

✔ What documentation flows impede productivity?

✔ What documents can be put online? Applications, Notices, Follow-up, Interactions?

✔ What Web-based forms could drive processes and interactions?

✔ How can portals improve engagement, satisfaction and efficiency?

# Take a Platform Approach

**Minimize the number of point solutions and work to consolidate applications and systems that can be integrated and used across the entire organization.**

✔ What do we wish are current applications did that they don't?

✔ How many different systems are we supporting and paying for?

✔ Which applications create the most workforce frustration?

✔ What applications could be consolidated?

✔ What tools could enhance our current applications?

# Leverage Automation

**Propel your organization toward growth by automating tasks and processes.**

✔ What tasks and operations can be automated?

✔ How could automated notifications, follow-up and escalations help?

✔ What bottlenecks slow your growth?

✔ What gets lost, missed or delayed in your processes?

✔ Are we leveraging mobile operations?

✔ What workforce frustrations can we eliminate?

✔ What security and compliance risks could be reduced?

# Migrate to Total Cloud

**Minimize IT Management of non-productive activities.**

**Store all of your data and documents in the cloud, opening up access whenever and wherever your team needs it.**

✔ Where can IT resources be deployed to make the maximum impact?

# The Demanding Role of the CIO

We're seeing significant expansion in the objectives of CIOs. This expansion can be seen as a necessary precursor to the digital transformation of the business. CIOs are expected to be the business executive that leads the charge into the digital and automation era.

New expectations include leveraging enterprise automation, accessing advanced analytics, augmenting existing talent, and being the catalyst for a cultural change.

## ENTERPRISE AUTOMATION
Organize and automate your processes organization-wide.
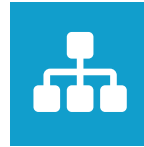
## CULTURAL TRANSFORMATION
Share your vision to prime the team for growth and change.

## DATA-DRIVEN DECISIONS
Focus on business Intelligence and analytics to create a more agile environment.

## DELIVERING VALUE
Extend your value beyond IT. The impact must be felt throughout the entire organization.

## AUGMENTING TALENT
Leverage technology to augment the skills and talents of your existing team.

## DIGITAL CHAMPION
You must become your organization's digital champion, and lead the change!

# The CIO's Biggest Roadblock

When it comes to digitally transforming your organization, what do you see as your biggest obstacle? Whether it's security, cultural resistance, or disaster recovery, you're in good company. In fact, nearly half of CIOs name "cultural resistance to change" as their #1 barrier.

## FOCUS ON CULTURE

Create a culture that is supportive of your user and their day to day demands.  Understand that they have expectations driven by consumer experience.

- 100% uptime
- Intuitive
- Real-time
- Low cost

## SET EXPECTATIONS

Ensure they are prepared for transformation and excited to adopt new technology, while understanding the limits of what it will provide.

## ALIGNMENT

Ensure new technologies fit the strategy, workforce and expanding demands of future growth.

## SHARE YOUR VISION

Learn to sell the C-suite, workforce, customers and vendors  on your vision for the company's future.

## ADDRESS CONCERNS

Provide answers to your team's questions about new processes, security, compliance and business continuity.

## VISIBILITY

Embrace the power of visibility by sharing the dashboards to enhance decision making, illuminate issues and drive successes and your team.
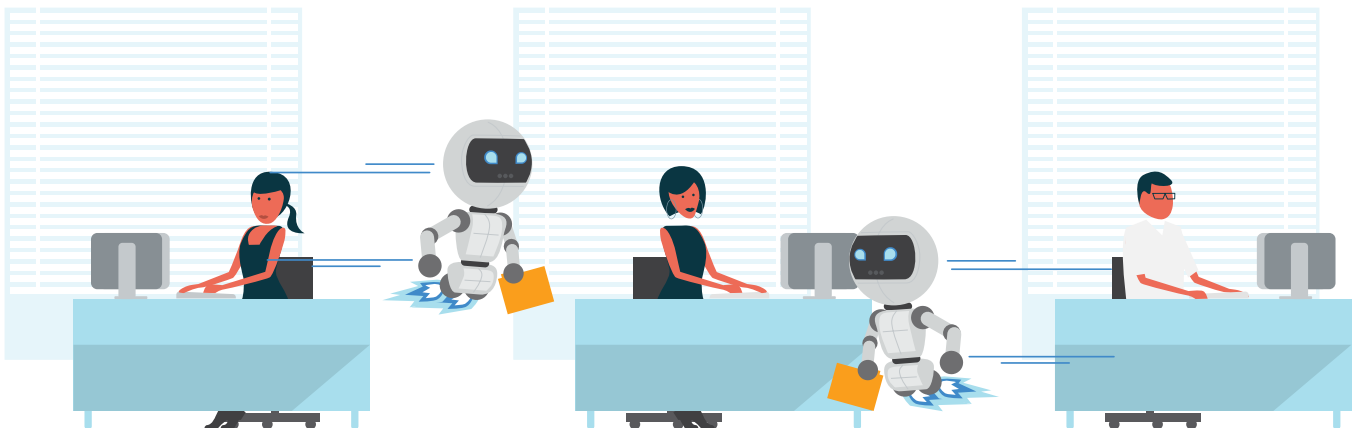
# CIO Life: Behind the Scenes

It's important to stay grounded, even as you charge ahead leading the digital transformation within your organization. Here are some tips for keeping your cool when the stakes are high.

## WORK-LIFE INTEGRATION
Rather than seeking out work-life balance, focus on work-life integration. Find lifestyle satisfaction from both your work and your personal life.

## SHARE YOUR PASSION
Mingle with other visionaries like yourself, and soak up their passion and ideas.

## INJECT SOME FUN
Gamify new metrics. Place "easter-eggs" as rewards into the work.

## CELEBRATE
Acknowledge the incremental successes with your team and share progress with the rest of the organization.

The life of a CIO is challenging and rewarding. Embrace digital transformation and automation as a way to increase the value of you and your departments across the organization and to simplify the lives of everyone around you. You will be much appreciated and rewarded.
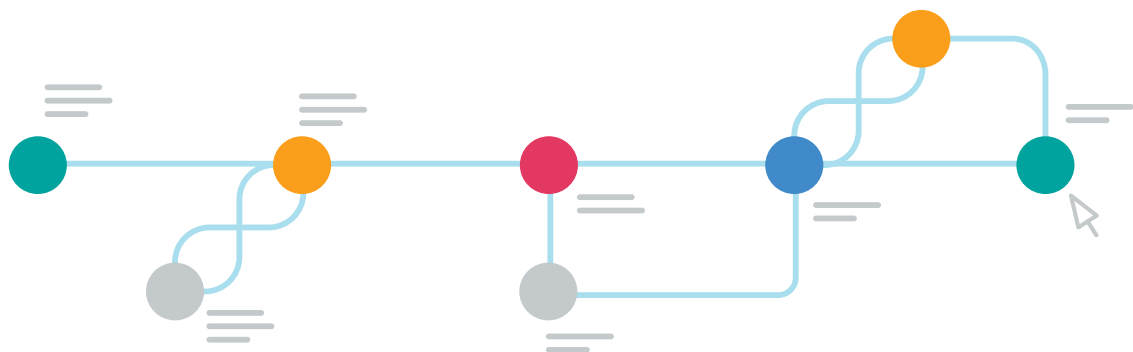
# **DOCU**PHASE

## Your all-in-one enterprise solution

The DocuPhase Enterprise Automation Platform provides the fundamental core capabilities to enable a complete digital transformation.  Seamlessly integrated, these cores provide the basic building blocks for rapidly developing and deploying applications and solutions to meet your greatest challenges and needs.

Once you understand the power of the combined cores, you will know a new level of possibilities to enhance your business.

### Workflow Automation
Take control of your business processes with workflow automation software.

### Robotic Process Automation
Eliminate data entry, ensure compliance & controls and increase capacity.

### Document Management
Go paperless and increase efficiency with document management software.

### Electronic Web Forms
Collect information externally and connect your company internally

### Data Capture & OCR
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.

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.

**330% Increase in Patient Volume**

**VIEW THE CASE STUDY**

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