

WINDWARD STUDIOS | WHITE PAPER

DOCUMENT AUTOMATION FOR REMOTE EMPLOYEES AND TEAMS

The Increasing Need for Tools
for Remote Workers



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Introduction

While there has been slow growth over the years in terms of employees working from home, the overall trend has seen a sudden rise due to the COVID-19 pandemic. As the world fights to contain the spread through testing and social distancing, employers across the globe are implementing work-from-home models as a strategy to fight against the COVID-19 disruption.

As the challenges vary by location, industry, and business maturity, businesses are finding it the most crucial and challenging task to determine and implement the right employee policies and smart approaches to remote work. Thanks to the advancement of business techs such as cloud-based software, smartphones, digital hangouts, document automation tools, and more, businesses are more accessible than ever.

Is Your Organization Remote Ready?

Many organizations feel that they're work-from-home-ready despite not having the proper tools and software. Now that COVID-19 has forced many employees to work from home, organizations are seeing cracks in the foundation. They might not have collaboration tools or the right training on how to navigate through remote work situations, and organizations are struggling to fulfill the demands of their remote workforce.

Nevertheless, there's a bright side to these troubles. Even if businesses don't have everything in place for a fully functioning, work from home plan right now, they can evaluate and efficiently get the right tools in place, and avoid a similar situation in the future.

While many businesses are somehow surviving this unanticipated situation by working from home, few are leveraging the advantages of remote tools to conduct meetings through video conferencing, generate reports through document automation systems, and more. This has led to a surge in demand for remote tools.

Increasing Need for Tools for Remote Workers & Teams

Remote work seems to be the most viable option for workforce resilience and business continuity in the present pandemic. This migration to digital working spaces has increased the use of online, remote tools.

As millions are now working from home, the need for managers and C-Suite executives to accelerate business processes is more critical than ever. When employees aren't in the same place, it is still crucial for them to know precisely at what stage invoices are in the payment process, is the legal framework ready to be submitted, are reports generated timely, and more. Creating approvals, reports, signatures, and documents manually takes up a lot of time and proves expensive for the business, especially when the employees are working remotely. So, modern entrepreneurs are stepping away from this long, manual slog with document automation; thus, simplifying the complex nature of inevitable admin duties and leaving more time and energy for marketing, brand development, and customer service, which are essential areas of business growth.

“EMPLOYEES SPEND
28%
OF THEIR WORKWEEK
ON MANAGING EMAILS,
SEARCHING FOR INFORMATION
ON JOBS THEY NEED TO COMPLETE.”

Introducing Document Automation Software

Historically, creating documents has been time-consuming. Thankfully, technological advancements have enabled the process to be faster and even more accurate. Through ways of cloud-based document automation tools, companies are utilizing inexpensive digital documentation solutions for enhancing their employees' productivity and efficiency as well as improving the bottom-line of their business.

Documents are the means of workflow and communication across an organization. At the same time, generating documents is quite labor-intensive. According to the McKinsey Global Institute Report, [employees spend 28% of their workweek](#) on managing emails, searching for information for the jobs they need to complete. When combined with the time they consume in creating, naming, sending, and organizing these documents, the necessity for document automation becomes clearer.

With manual or error-ridden documents, organizations suffer from additional expenditure, elongated staff time, and below-par customer service. But when it comes to automating documents, companies can ensure concise, up-to-date paperwork. Besides, it makes the admin processes far more efficient; thus, securing a business's reputation. As document automation refers to digitizing everything from reports to contracts, data entry to invoices, and project proposals, it plays an essential role in the success of a business.

Document automation utilizes smart templates that help businesses produce the right document in no time. In simple words, it lowers the expertise an organization requires to generate documents like a contract or agreement that usually needs a legal team. With the right document automation tool in place, even its administrative staff can produce the same as all the legal expertise is compiled in the template itself. However, document automation is not meant to replace humans. Instead, it helps them optimize their role and empower them to be more productive. When an organization can eliminate the time its experts spend on mundane tasks, they will be able to add more value to the business by focusing on other crucial aspects. Document automation software is crucial for many industries, including legal, sales, banking, real estate, accounting, healthcare, and many, many more.

Managing Remote Teams & Employees from Afar with Document Automation

In a crisis such as the COVID-19 pandemic, when employees aren't in the same place, managing a remote team comes as a challenge to the managers. It requires them to tackle the communication and availability issues that regular offices don't have. Right from centralizing information and communicating regularly to documenting processes and organizing tasks, there are as many roadblocks in the way as one can think of. While they are battling with a bunch of new issues and finding ways to get through the mess, deploying a document automation system can serve as a boon in this crucial time.

Permitting employees across disparate locations to access crucial information puts the company at high risk. But the document automation system helps organizations improve data security compliance. Some of them even come with role-based settings that help a manager restrict users to access only the data that is helpful for them. Thus, managers can control permissions for every remote worker or team.

Good document automation software allows employees to create templates in a short amount of time. Later, editing a template takes far less time than building from scratch. Also, using templates ensures that users are less likely to leave out key information. Moreover, templates guarantee brand consistency with standard format, design, and structure.

With document automation tools, managers can hence ensure that their remote teams aren't spending time on mundane tasks.



Document Automation Software Benefits for Remote Teams

1. Create/Revise Templates Faster

As many of the day-to-day tasks are variations on something done hundreds of times before, there's no need to reinvent the wheel. Instead, document automation empowers your remote workforce to use templates. As it provides an online repository of the templates created beforehand, all that the users require doing is add/remove/alter the information in the existing template. And the new document will be ready within a fraction of the time. Thus, users can work on their own without syncing with others while they operate remotely. Employees will save time and get work done faster.

2. Automated Document Routing

Depending on the projects and the type of documents, the list of approvers and managers may vary. It isn't feasible for managers to ask each remote worker to submit documents for approvals and signatures. Neither is it flexible for the remote workforce. What a document automation system does is it at first addresses each document by type; then, it assigns that document an appropriate workflow. When a document is ready, it automatically gets routed to the relevant employees for review; it then passes on to the manager for final approval. This ensures that the documents are ready for final distribution. Managers can define routing rules based on their needs.

3. Integration with Microsoft Office

As almost everyone is familiar with the MS Office environment, working on the document automation tool would be easier. So, most document automation systems come with MS Office integration abilities. Thus, managers can be assured that their remote teams, regardless of their background, will face no difficulty in dealing with the document generation process.

4. Data Security

A document automation system empowers managers to keep the data and documents secure. It lets them set appropriate user levels to access, approve, and review documents. Beyond that, document automation tools enable managers to control the visibility of data, i.e., particular users can access only the amount of data made available to them. This varies depending on the users' access level set by the managers. This makes sure that the document automation system is working securely.

5. Enhance Employee Productivity

As the document automation tool eliminates human intervention in the document generation process to a great extent, it frees employees to work on quintessential elements of their job. This helps them perform their job better, makes them more productive, and boosts their efficiency. It also provides them with better working conditions, whether at home or office, and enables them to complete the document creation process more accurately while minimizing human errors, eliminating friction points, reducing costs, boosting morale, and encouraging loyalty. This will help managers strengthen the brand and contribute to a business's success.

Document Automation Software Works Across Industries

Many industries need to utilize document creation tools:

Pharma Research



Finance



Real Estate



Legal Services



Compliance



Insurance



Healthcare



1. Pharma Research

Scientists spend a lot of years researching and finalizing the right combination of substances to make a new drug. In this course, they need to generate large volumes of documents for different tests and development in their study. Besides, they need to comply with the FDA (Food & Drug Administration) regulations. Handling such an ever-increasing volume of documents manually along with compliance is simply unimaginable. This is where the document automation system comes into the play & makes the process a breeze.

2. Compliance

Document Automation ensures that compliance approval is enforced for all collaterals before the documents are processed for publication. It is efficient to capture online audit trails; thus, reducing the risk of breaching regulatory compliance guidelines. Besides, document automation systems see to it that reviewers can make amendments and save them in real-time; thus, ensuring that all the mentioned information is correct with the company criteria.

3. Finance

As creating financial reports is a tedious and time-consuming process, leveraging document automation tools to generate financial statements can be a great time saver. By automating the process of gathering data, it improves the efficiency of the finance team; thus, letting them focus on more crucial things. Instead of taking printouts of every report/statement and filing them, document automation helps organizations go paperless and save money. Also, it eliminates the risks of human errors and creates audit trails so that the finance team gets complete visibility of the process.

4. Insurance

Right from application functions to underwriting to claims, document automation helps insurance companies simplify the processes. Be it ensuring better data protection, enhancing customer experience, boosting claim processes, or offering better services to policy holders, document automation makes sure everything is top-notch. Hence, it decreases the time and efforts spent on administrative tasks while ensuring greater cost efficiency.



5. Real Estate

Real estate agencies handle dozens and dozens of deals, claims, or mortgage documents simultaneously. Manual document generation can hamper their efficiency and lead to a decline in the level of service they could offer the clients. Instead, automating some of the processes like document creation can relieve them from the growing burden of information. Also, they can streamline the processes and improve their bottom-line.

6. Healthcare

From physician agreements and credential documents to timesheets, research papers, and other organizational forms, the healthcare industry deals with several documents on a daily basis. Embarrassing document automation can help them run smoothly and be more compliant toward enhancing patient care. Producing documents in bulk and sending them for eSignature can make the system more efficient and accurate.

7. Legal Services

As per a study by Rocket Matter, lawyers can save [up to 80% of their time](#) by adapting to document automation. Thus, they can invest this time to practice law and work with more clients. Whether to create a flat rate quote, letterhead, tax info, retainer letter, or other documents, it can benefit legal services with enhanced productivity, reduced manual errors and expenses, and improved efficiency.

The Shift to Document Automation Amidst COVID-19 Outbreak

As it's now apparent that work from home might be the scene for the coming days, one of the growing concerns companywide will be to keep their remote workers and teams effective and efficient. Moreover, they don't want their employees' productivity to tank due to the COVID-19 disruption. Thanks to a range of cloud-based tech tools that keep communication and collaboration going on between teams, albeit they work remotely. But what when it comes to creating and sending documents that your team often encounters with?

In this digital age, where organizations are either going remote or hiring remote employees, some organizations still rely on physical interaction and manual workflow. They still manage review and approval processes through printed forms. While this old-school approach may persist for different reasons:

- Some prefer making edits or changes on hard copies
- The system they have works though being slow
- They fear technology, specifically, compliance issues

Unfortunately, the COVID-19 disruption has forced companies to bury down these kinds of manual processes and find ways to digitize them; thus, to keep the business running with a remote workforce. While manual processes are slow, cumbersome, and inaccurate, work from home makes them even slower. Instead, document automation makes them more efficient.

As employees now work from home, creating and revising templates is prone to get even slower though companies have document automation systems in place. It demands them to put more efforts either in adapting the remote system or solving every hassle on their own as most document automation solutions require a team effort. This leads to delayed workflows and thus hampers business' growth. Therefore, many companies are updating their technology to implement new emergency rules and programs during these unprecedented times.

Worst is the case with organizations devoid of document automation tools. As they rely on manual processes, the workflow gets even slower or even brings the business workflow to a halt.

Fortunately, [there are many solutions to explore](#). With just an upfront investment of time to implement the best document automation software for your company's use case, your business will definitely benefit down the road. Whether you want to upgrade your existing document automation system, or want to implement a new one, take the time to research your options and read reviews from others in your industry. You can empower your remote workforce to eliminate mundane tasks and save time and resources immediately.

With document automation tools becoming more accessible and easier to integrate, business opportunities will continue to grow.

Don't let the COVID-19 pandemic affect your productivity. Deploy the right tools & get going!