eBook

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Process innovation made easy.

Join the Mailroom Revolution

A Comprehensive Guide to Digital Mailrooms

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Introduction to Digital Mailrooms

Quick Delivery Right into the Hands of Stakeholders

In the era of digital transformation, many business processes continue to depend on physical documents arriving through the mailroom. Cases, claims, transactions, and remittances still hinge on forms, wet signatures, and supporting documentation arriving through the mailroom. On the regulatory side, mailrooms are the entry point for the information organizations must process to meet service level agreement (SLA) obligations and stay compliant.

Mailrooms remain a holdout of manual labor like hand sorting, which can take up to 75% of a mailroom employee's labor hours. In more advanced mailrooms, processing extends to envelope opening and content scanning – time-consuming tasks that risk exposing personally identifiable information (PII). All too often, the mailroom is both the entry point for vital information and a hub of inefficiencies.

Secure Automation with AI and Powerful Machines

Digital mailrooms enhance organizational resilience by automating the receipt, sorting, opening, and scanning of incoming mail, then capturing and classifying content and routing it electronically to recipients and directly into workflows. They strengthen the chain of custody and can utilize artificial intelligence to limit access to sensitive information. They are essential for supporting a hybrid model in which an increasingly dispersed labor force performs critical tasks outside traditional work centers.

Modern digital mailrooms combine state-of-the-art equipment with AI-enabled software. They provide value by automating specialized tasks, speeding processes, enhancing security and compliance, and enabling organizations to increase processing volumes with a leaner workforce.

If the mailroom is your organization's ground floor for information, shouldn't it also be its kickoff point for innovation? Let's take a deeper look at cutting-edge digital mailrooms.

> Employees in traditional mailrooms spend 75% of their labor hours on manual processes.

Key Considerations for Implementing Digital Mailroom Solutions

In transitioning from traditional to digital mailrooms, decision-makers must weigh several factors to ensure seamless implementation. It's essential to understand the processes that will be enriched by a digital mailroom solution, the hardware required, upfront costs, and the potential savings.

All too often, the mailroom is both the entry point for vital information and a hub of inefficiencies.

Understanding the Mailroom Equipment Landscape

Implementing a digital mailroom solution begins with an upfront investment in mailroom automation equipment. Today's options range from sorters and scanners to all-in-one models that integrate envelope opening, content extraction, document feeding, and scanning into one comprehensive workflow.

The right choice for your organization will be determined by your organization's goals, whether that's expediting a single step of the mailroom process or converting your manual mailroom into a hands-free, completely automated operation.

Evaluating the True Cost of Manual Mailrooms

Organizations often underestimate the return on the upfront costs of implementing a digital mailroom, but time and again, the initial investment pays off in exponential benefits.

Beyond the costs of material mailroom supplies, you must evaluate the time spend. How many person hours are currently spent sorting mail and opening envelopes? Scanning contents? Manually forwarding information into email? Or even hand-delivering? Account for the cost of human error. How long does each piece of misdelivered mail delay a business process? How often does error put your organization

at risk of non-compliance and fines? Don't forget the time required for return mail processing and contact database updates.

Weigh the expenses above against the cumulative costs of mailroom equipment purchases, servicing agreements, and software licensing. Compare them over the payment term to discover how much money a comprehensive mailroom solution will save your organization. Financial services and some government agencies should factor in potential fines if regulated SLA's are missed. By conducting a thorough analysis, you can accurately assess the value of a digital mailroom.

Integrating Digital Mail into Existing Business Processes and Systems

Digital mailroom solutions enable your organization to seamlessly integrate the information flowing through its mailroom directly into business processes and systems. Whether interfacing with CRM platforms, content and retention management systems, ERP software, or workflow applications, digital mailrooms ensure the smooth flow of accurate information to enhance overall efficiency. They can replace a series of labor-intensive manual tasks with minimal disruption to operations.

Processes Enhanced by Digital Mailrooms

Fully integrated digital mailrooms accelerate processing for organizations across industries, including government agencies, financial services, higher education institutions and anyone handling processing claims.

Here are just a few business process use cases for digital mailroom solutions.

ILINX® + OPEX®
DIGITAL MAIL AUTOMATION

Case Initiation & Management

Claims Processing

Billing, Collections & Remittances

Loan Processing & Document Intake

Phases of Digital Mailroom Implementation

Use these phases to assess your organization's current level of innovation and chart a path to its desired state.

① Manual mail handling with no automation

Humans receive, sort, and distribute physical mail at a centralized location.

Pros

On-site mailroom employees have expertise in manually routing information.

Cons

As workplaces shift to a hybrid model, remote employees may receive critical information late or not at all. Claims or other customer initiated communication will be missed or delayed.

② Minimal automation

Utilizes either a mail opener or a scanner to facilitate intake or digitization.

Pros

Mailroom hardware lessens the manual labor burden on mailroom employees.

Cons

Individuals must still manually perform most steps of the mailroom process, delaying information capture and delivery

③ Moderate automation

Uses both a mail opener and scanner to open mail and digitize contents.

Pros

Technology reduces the labor hours spent sorting and digitizing information arriving through the mailroom.

Cons

Mailroom employees must still perform manual actions such as batch prep, moving between devices, and sending digitized information to recipients through email. Sensitive information may be exposed during handling and business processes are often delayed.

④ Total automation with AI-driven workflows

Utilizes advanced hardware that integrates mail opening and scanning all in one device.

AI-enabled software analyzes the contents, makes determinations, and delivers critical information directly to recipients or line of business systems.

Pros

End-to-end intelligent process automation reduces manual labor, secures and protects sensitive information, reinforces chain of custody, and instantly delivers actionable information precisely where needed.

Cons

Change management and organizational leadership is needed to seamlessly transition to the digital mailroom solution.

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Unlock the Next Level with AI and Intelligent Workflow

Artificial intelligence (AI) has revolutionized organizations' ability to derive value from every facet of operations. Its integration into document-based processes unlocks new frontiers of efficiency and effectiveness. When applied at the point of intake (the mailroom), AI enables businesses to create actionable content, enhance security, streamline workflows, and achieve compliance like never before.
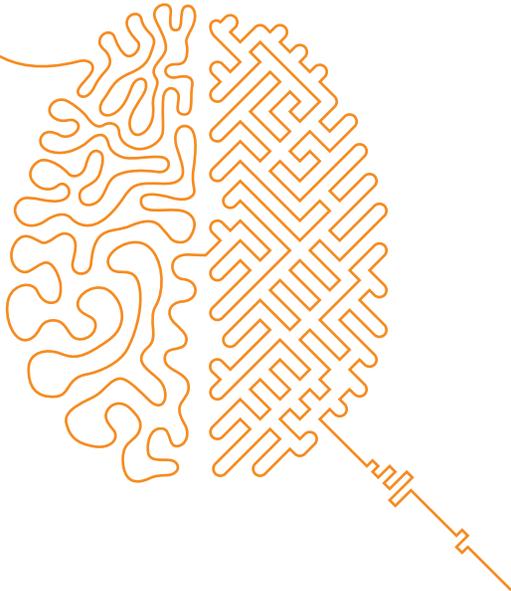
Use AI to Identify and Process Documents

With AI, businesses can now automate tasks that formerly required human intelligence to speed processing and eliminate human error. By leveraging advanced algorithms and machine learning, AI-enhanced digital mailrooms can identify and categorize documents by type, enabling organizations to process large volumes of mail with unmatched speed and accuracy.

Reduce Manual Tasks and Streamline Workflows

Digital mailrooms that leverage AI significantly reduce the labor burden of mail processing. Employees no longer need to interpret handwritten characters or manually key information into systems—AI automates these tasks with a higher degree of accuracy than human processing. AI makes decisions and acts on information, inserting and routing data and documents through the next steps via workflows.

Enhance Security and Chain of Command

Organizations can leverage AI to enhance data encryption and control access, protecting sensitive information arriving through mailrooms from unauthorized access or data breaches. Information is captured and processed 100% digitally, creating a documented chain of custody while protecting it from potential bad actors or accidental breaches in the organization.

Reinforce Compliance

AI strengthens an organization's ability to meet SLAs by fast-tracking processes. AI can help initiate and update claims, secure information, and enforce rules-based access to sensitive data. By automatically flagging discrepancies and anomalies, AI enables organizations to respond more quickly to customer inquiries and handle special cases with ease.

ILINX + OPEX Digital Mail Automation: The End-to-End Solution

ILINX, the world's most flexible process-improvement platform, partners with OPEX, the global leader in document and mailroom hardware solutions, to create today's most comprehensive and intelligent digital mailroom solution.

OPEX hardware automates mail intake, including envelope opening and scanning. ILINX takes it from there, leveraging AI-driven document understanding and workflows to identify document types, capture and secure content, and initiate processes.

ILINX + OPEX Digital Mail Automation: Five Key Benefits

Manual activity like envelope opening and content scanning are time-consuming tasks that risk exposing personally identifiable information.

1. Increased Efficiency

OPEX hardware replaces manual opening and scanning, performing these operations within seconds. ILINX rapidly moves information from mailed documents into workflows and line of business systems. Organizations can capture and process mailed data more efficiently, leading to faster decision-making and elevated customer interactions.

2. Improved Accuracy

The OPEX Falcon+ RED envelope opener and production scanner sorts and scans to reduce the possibility of damaged documents and misinterpreted information. The ILINX platform enforces organization-determined rules and learns from past actions to prevent human processing errors. The combined solution ensures that critical information is consistently routed to the right system, department, or user, resulting in better data handling and security.

3. Effective Spending

With ILINX and OPEX, organizations can restructure mailrooms around a few essential employees instead of dozens. Freed from the tedium of manual sorting, scanning, and deliveries, personnel can focus on more high-value tasks. The accelerated speed of digital processing supports better access to real-time data, enabling organizations to forecast and budget more accurately.

4. Enhanced Security

Automated opening, extraction, sorting, and scanning replace human links in the chain of custody, eliminating risky access or exposure of mailed content. Patented ILINX Data Loss Prevention technology safeguards information with AI-driven identification and intelligent redaction. By tying permissions to role and location, ILINX ensures that only authorized users can view sensitive information, bolstering security protocols.

5. Scalability

From small enterprises to Fortune 500 companies, ILINX + OPEX digital mailrooms are the foundation of innovation. OPEX hardware seamlessly processes unprecedented volumes of incoming mail, keeping pace as organizations grow. As the benefits of ILINX process innovation extend beyond the mailroom, organizations can leverage the platform enterprise-wide to reach new heights of operational excellence.

The integration of ILINX and OPEX extends the reach of your mailroom through every department, enabling on-site and remote employees to act on critical information with unprecedented speed.

By securing mail at the point of delivery, eliminating manual tasks through automation and AI, and integrating seamlessly with line of business systems, organizations can achieve new levels of efficiency and productivity.

ILINX + OPEX in Action

A leading global financial services company knows the value of the information arriving through its mailroom.

Pandemic forces financial services leader to augment OPEX system

A financial services company was in phase three of mailroom automation (moderate) when the COVID-19 pandemic hit in 2020. It employed a staff of more than 500 at secure work centers to handle document processing and distribution while leveraging OPEX mailroom machinery to burst envelopes and scan contents. When the federal government announced stay-at-home orders, the company needed to rapidly shift to a fully automated digital mailroom to comply with mandated claims resolution timelines.

AI-Powered ILINX software enables highly secure, hands-free processing

The financial services company integrated ILINX Advanced Capture into its mailroom operations to accelerate data capture from arriving documents. AI-driven Advanced Capture captures data from regular form fields and unstructured documents, using optical character recognition (OCR) to reliably convert handwriting to machine-readable text. The solution inspects layout and text to separate and classify documents.

ILINX Cognitive Services uses AI to locate specific information types, such as claims details, social security numbers, and more. It integrates with the company's Salesforce system to auto-import and route case-related information to an international workforce for remote processing. ILINX DLP enforces role and location-based permissions, ensuring data security beyond traditional workplaces. During the pandemic, the solution enabled the company to continue meeting regulatory standards for claims processing despite the global disruption.

End-to-end automation supports hybrid workforce

Today, the financial services company's ILINX+OPEX digital mailroom solution supports its contemporary model as a hybrid workplace. Information security is stronger than ever with a fully automated chain of custody. Best of all, ILINX AI enables the company to process claims at unprecedented speed by allowing its valuable workforce to focus their efforts more specifically on exception processing.

The company's digital mailroom solution empowered it to navigate the COVID-19 pandemic and successfully shift to a modern, more flexible work model, strengthening security while improving operational efficiency overall.

Read this success story on ImageSourceInc.com.

Moving Forward

The benefits of automation cannot be fully realized until automation extends from the ground floor through every business process. Digital mailrooms, backed by the combined power of ILINX + OPEX, enable organizations to apply end-to-end innovation from the moment of information intake.

Go beyond automation to achieve true process intelligence with ILINX AI. Leverage the combined benefits of Advanced Capture, Cognitive Services, Data Loss Prevention, and Intelligent Workflow to ingest, understand, protect, and route information to propel your digital transformation forward.

Are you ready to join the mailroom revolution? ILINX + OPEX is your pathway forward.

Ready to move forward?
Let's collaborate!

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About ImageSource

ImageSource has been helping organizations modernize for more than 30 years. We are the manufacturer of ILINX, the world's most flexible process-improvement platform.

The modular design and high interoperability of ILINX enable seamless legacy modernization, systems integration, and iterative evolution for organizations across industries, including government, financial services, Tribal Nations, Higher Ed and more.

Wherever organizations need to onboard, utilize, store and manage, or integrate and leverage data, ILINX is the solution.

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"With the advanced ImageSource solution, we now have an infrastructure in place to move the whole organization forward."

Annabaker Garber

Clinical Information Systems
Education Manager
Swedish Medical Center

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