FAX SOLUTIONS

IMPROVING BUSINESS BY IMPROVING FAX

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INTRODUCTION

Don't worry: You are not the only one still using fax. Despite its reputation as an outdated technology, fax remains prevalent in business communications. And when an organization's faxing system is unreliable or doesn't provide the capabilities to support business process improvements, the impact can be significant. Delayed or lost fax communications hit the supply chain hard, sending ripples through order management, customer billing, purchasing and accounts payable.

Most organizations recognize the importance of fax communication to core business processes, with many implementing server solutions to perform their faxing functions. While these technologies offer clear advantages over fax machines, they still put business performance at the mercy of an in-house faxing tool. If the system is not running properly, neither is the business.

In response, business and IT leaders within forward-thinking organizations are asking themselves some key questions:

- "What are the fundamental business problems that involve faxing?"
- "How do those problems affect other areas of the organization?"
- "If we didn't have a faxing system in place and wanted to implement one, would we choose what we have now?"
- "Is there a better way to handle our document traffic?"
- "What are the options to replace our fax server, and how do we go about it?"

About This White Paper

The purpose of this white paper is to help your organization find the necessary answers to these questions by presenting an overview of:

- Key factors in regard to fax technology, IT operations and the overall business
- The impact of your faxing system on end-to-end business processes
- Product selection process and solution delivery

With an eye on setting up your organization for both immediate and future success, this paper advises choosing a vendor that understands the critical relationship between fax communication and business processes, and offers flexible solutions to meet the unique needs of any organization.

UNDERSTANDING THE RELATIONSHIP BETWEEN FAX, IT AND THE BUSINESS

Solving a business problem that involves fax is never just an IT project. Because fax communications have a direct impact on so many aspects of an organization, business leaders and technology leaders need to work together and determine when and how to involve various stakeholders. Only when that happens can an organization determine what it really needs and identify the best solution.

Common Fax Issues

In regard to faxing technology, organizations face a variety of issues with the tools they rely on to support day-to-day business operations. Factors that often lead to issues include:

- **Fax software company mergers and acquisitions** which create uncertainty surrounding the future of installed fax server products.
- **Customer support issues** that arise from poor responsiveness and insufficient knowledge of the product in relation to an organization's specific environments and business processes.
- **Asset management and TCO** such as running and managing assets to support faxing, including server maintenance costs, telephony expenses and telecom charges.
- **Stability issues** stemming from fax servers that may fail without warning, which can cause disruptions that are felt throughout the business.
- **Functional limitations** such as lack of scalability to support growth, notification of fax delivery status, self-service capability for users to resend faxes if necessary, and support for technologies such as Fax over IP (FoIP).
- **Too much paper** as many organizations still find it necessary to print hard copies and file fax documents manually.

Common IT Issues

On the IT side, important considerations include:

- **Time and money spent maintaining fax infrastructure** such as fax lines, fax boards and multiple servers — costs which are compounded for international companies with offices around the world.
- **The need to consolidate on one platform** to standardize production and desktop faxing integrated with business applications, inbound and outbound faxing, and shared services centers.
- **Change control** for implementation and upgrading of any ERP, desktop or other business application.
- **Declining or increasing fax volumes** that no longer match up with the fixed costs of the resources to support them.
- **Help desk calls** related to faxing.

Aligning IT and Business Needs

Here are a few basic tips to effectively align the needs of IT and the business together:

- **Include IT and business leaders** in vendor demonstrations of potential solutions.
- **Get end users actively involved** in evaluating potential solutions.
- **Consider how a potential solution may be extended** to processes and departments throughout the organization.

ACCOUNTING FOR BUSINESS PROCESS IMPACT

Organizations that focus on fax alone, rather than converging around core business processes, limit their ability to improve efficiency within the order-to-cash and procure-to-pay cycles. The decision to replace a fax server represents a valuable opportunity for your organization to examine and strategize how this change will impact key business processes.

How Far Does Your Fax Server Take Supply Chain Efficiency?

Optimizing performance in procurement demands more than just automatically faxing documents such as purchase orders (POs). Organizations also need to be able to:

- **Assemble and send supporting documents along with the PO**, such as specifications or terms and conditions.
- **Deliver the documents to multiple recipients** within the vendor company, often by different means (e.g., fax to one contact and email to another).

Does Your Fax Server Help with Customer Billing?

Achieving strategic objectives such as DSO reduction often requires the ability to:

- **Assemble and send supporting documents along with the invoice,** such as the original order and proof of delivery.
- **Enable subscription list** capabilities that make it easy for customers to choose e-invoicing.
- **Automate delivery of invoices via postal mail** for those customers who prefer it.

Can Your Fax Server Process Inbound Customer Orders and Vendor Invoices?

Removing inefficiencies associated with processing of transactional documents received via fax requires:

- **Intelligent routing and prioritizing** of orders and payables.
- **Reporting on process metrics** based on volume, documents processed per FTE and other criteria.

Document Accessibility for Customer Service and Competitive Advantages

Gaining and maintaining a competitive edge — even for organizations that offer leading products and services in their markets — often comes down to customer satisfaction. Immediate access to documents received and sent via fax is crucial to respond to customer inquiries and resolve disputes quickly.

ORDER PROCESSING	Sales Order, Order Acknowledgment
PURCHASING	Purchase Order, RFQ, Specs, T&C
SHIPPING	Shipping Report, Shipping Confirmation, Bill of Material

CORPORATE COMMUNICATIONS	SEC Filings, Investor Relations, Executive Development
ACCOUNTS RECEIVABLE	Financial Report, Invoice, Statement, Collections, Credit References, etc.
ACCOUNTS PAYABLE	Remittance Advice, Electronic Fund Transfer Sheet, Payment Request

NAVIGATING THE OPTIONS

Today's best-of-breed technology offers organizations several solution options for solving a wide range of complex business problems that involve fax.

Document Process Automation Solutions

When considering the "big picture" of fax in relation to business processes, organizations often find that replacing one fax server with another is not the best answer. A unified automation platform allows users to manage fax as well as other processes such as accounts payable and order processing. This opens the door to automate entire document lifecycles, including the capture of inbound data, routing and approval workflow, delivery via any combination of output transports, and electronic archiving.
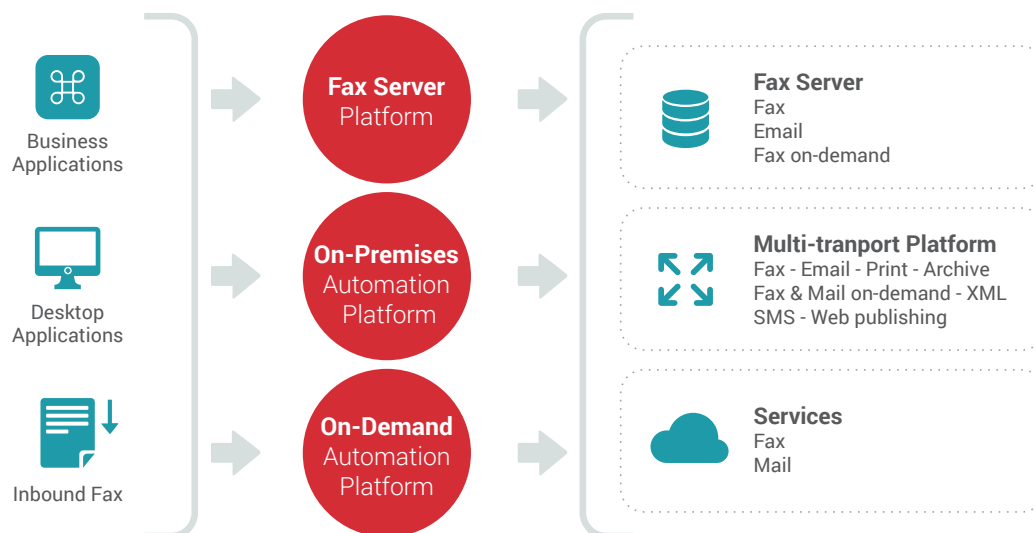
On-Premises Server Software

Whether it is a fax server or a multi-transport platform, having the software in-house gives your organization hands-on control over document management. An on-premises solution also offers tight integration with front- and back-office applications as well as the ability to customize the solution for specific requirements.

On-Demand Services

Vendor-hosted services offer the benefit of low up-front investment and the flexibility of variable versus fixed costs. This eliminates the need to buy and maintain new software or hardware while offering virtually unlimited volume for quick processing of large fax transmissions.

Software as a Service (SaaS)

As a backup solution when using fax boards, a fully capable server solution provides the option to use vendor-hosted SaaS solution for overflow and failover. This can eliminate the need to manage multiple redundant server systems in-house. Fax traffic can be automatically routed to the service during periods of peak volume or when local fax infrastructure is down. When the peak volume or downtime ends, processing reverts back to your local system.

Business Applications → **Fax Server** Platform → **Fax Server** Fax / Email / Fax on-demand

Desktop Applications → **On-Premises** Automation Platform → **Multi-tranport Platform** Fax - Email - Print - Archive / Fax & Mail on-demand - XML / SMS - Web publishing

Inbound Fax → **On-Demand** Automation Platform → **Services** Fax / Mail

EXECUTING THE PROJECT

Fax Migration Expertise and Resources

No matter what the chosen solution is, project success will depend heavily on the vendor's level of experience in helping organizations migrate fax server solutions. This should include Professional Services to assist with implementation if needed, and a proven track record of knowledgeable product support.

Business Process Analysis

Execution should include a thorough analysis of your organization's document processes to identify risks as well as opportunities for efficiency gains. A vendor that applies knowledge gained through a significant depth of practical experience will help you define and adopt best practices to maximize your ROI.
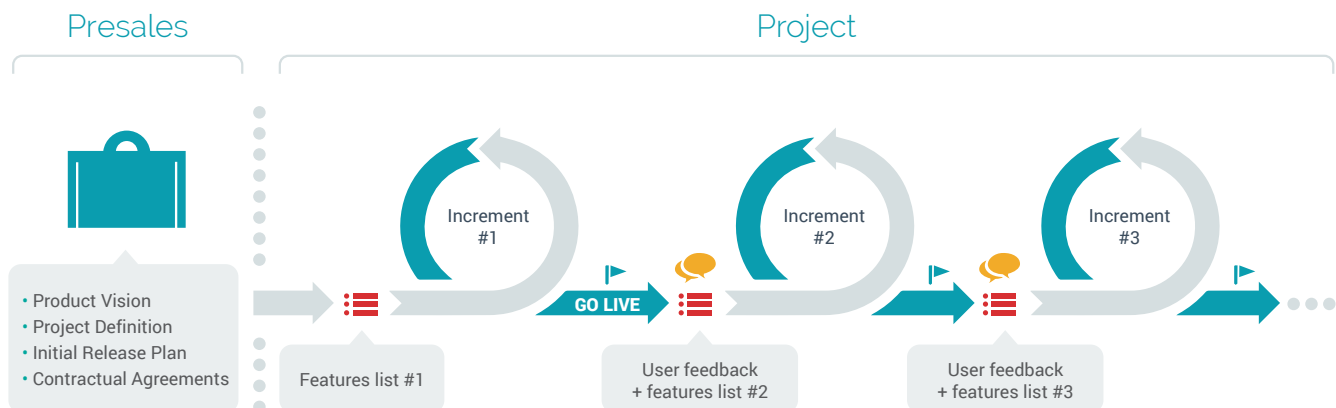
Solution Methodology

Success in solving business problems that rely on fax requires thoughtful planning and an effective strategy. To ensure that your project delivers the desired results on time and within budget, the vendor should offer a formal solution methodology encompassing needs assessment, requirements and process analysis, implementation, and production.

The "agile" approach

As opposed to the traditional "waterfall" implementation, "agile" methodology offers a hands-on approach to managing your project so that maximum value can be achieved quickly throughout every phase of solution delivery. This high-level of customer involvement and customization typically leads to a number of advantages including:

- Gaining the benefits of the solution more rapidly with faster ROI
- Investing resources in the most valuable features
- Reducing risks and lowering overall startup costs
- Ability to make decisions and modifications with context and experience
- Quickly receiving new features to test
- Being directly involved in the project; greater process insight

Presales | Project

• Product Vision
• Project Definition
• Initial Release Plan
• Contractual Agreements

Features list #1

Increment #1

GO LIVE

User feedback + features list #2

Increment #2

User feedback + features list #3

Increment #3

ABOUT ESKER

Esker is an industry leader in document process automation solutions, helping organizations of all sizes Quit Paper™ and improve how their business information is processed and exchanged via one unified automation platform. Esker's suite of automation solutions help customers around the world reduce processing time and costs, increase their competitive advantage, gain significant operational efficiencies, and realize measurable ROI in as little as three to six months.

Expertise in Fax Solutions

Esker is regarded as a top 3 provider of enterprise fax software solutions, with over 20 years of experience developing fax software. A pioneer in cloud services for fax and document processing, Esker has 3,000+ SaaS customers and 200,000+ SaaS users worldwide.

Global Footprint

Founded in 1985, Esker has over 80,000 customers and millions of licensed users worldwide. Esker operates in North America, Latin America, Europe and Asia Pacific with global headquarters in Lyon, France, and U.S. headquarters in Madison, Wisconsin.

U.S. Headquarters:
Madison, Wisconsin

World Headquarters:
Lyon, France

One Platform. Any Process.

Esker solutions (offered on-demand and on-premises) span the entire order-to-cash and procure-to-pay cycles — allowing organizations to automate virtually any business process that runs on paper documents.

- **Order Processing:** Automate the entry and routing of incoming customer orders.
- **Accounts Receivable:** Automate the processing and delivery of billing documents based on customer preferences.
- **Accounts Payable:** Automate entry and routing of incoming vendor invoices and other payables.
- **Purchasing:** Automate the processing and delivery of supply chain documents based on vendor preferences.

Data Security & Integrity

Esker has earned SSAE 16 Type 1 and Type 2 compliance for its on-demand automation solutions (following an audit conducted by A-lign™ Security and Compliance Services). This means Esker's processes, procedures and controls have been formally reviewed and are documented in accordance with the SSAE 16 guidelines. Esker also adheres to the principles set forth by the Safe Harbor Privacy Policy in respect to transfers of personal information from the European Economic Area to the U.S.

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Esker, Inc.
1212 Deming Way, Suite 350
Madison, WI 53717
Tel: 800.368.5283 | **Fax:** 608.828.6001
Email: info@esker.com | **Web:** www.esker.com

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