TCG|||
ENABLE THE DIGITAL ENTERPRISE

Transitioning Document Automation at INTEGRIM

Introduction

For more than 30 years, INTEGRIM has been providing business processing and digital transformation for all types of financial documents, creating seamless connections to over 30 different ERP solutions for thousands of clients. Headquartered in Montreal, Canada the company works across French, English, Spanish, and Dutch languages and has a presence across North America.

Faced with the need for greater flexibility, scalability, and customization in their document automation solutions, INTEGRIM embarked on a journey to transition from a traditional hard-coded approach to a low-code-no-code solution.

In addition, discussions with their clients derived a need for straight through processing with a greater level of validation, accuracy and modernization.

The traditional hard-coded document automation solution had served INTEGRIM well in its initial stages, but it posed several challenges as the business grew.

Core Challenges:

- **Lack of Flexibility**: Making changes or adding new features to the automation process required significant development time, leading to delayed response times for clients' evolving needs.
- **High Costs**: The costs associated with hiring and retaining skilled developers to maintain and enhance the existing solution were substantial.
- **Customization**: Clients increasingly demanded personalized solutions, which were difficult to deliver with the rigid hard-coded system.
- **Complexity**: The complexity of the solution made it challenging for non-technical stakeholders to understand and collaborate effectively.

INTEGRIM began researching and looking for a solution to not only meet their immediate needs but also future proof to adapt to client growth.

Recognizing the need for a more agile and scalable solution was only one aspect of what was required in a solution, advanced AI and OCR technology for improved accuracy and less human intervention was also required. Most importantly, INTEGRIM wanted to work with a company in partnership, that allowed for evolution, always thinking about the future and emerging trends to support their business.

Looking at several different alternatives, no other products fit the price, output expectations or flexibility of customizations that are presented by DocProStar.

> "TCG Process represented a Lego type technology that allowed us to put the pieces together to fit our client needs. The DocProStar team was with us every step of the way, and we did not need programmers to capture workflows. For us the solution is very powerful and has great potential.
>
> *André Denis,*
> *President, Chief Delivery Officer & CTO*
> *INTEGRIM*

Key Steps and Results

Platform Selection: INTEGRIM carefully evaluated several platforms and selected DocProStar as the solution that best aligned with their requirements, including ease of use, scalability, and support for complex automation logic.

Standard Package Offerings: INTEGRIM has created a set of standard package offerings catering to common document automation needs across industries. These packages were designed to be easily customizable, allowing clients to choose predefined modules that suited their requirements.

Significant Efficiency Gains: The integration of TCG Process's technology enables INTEGRIM to achieve substantial efficiency gains. The automation of data extraction, validation, and routing has led to faster turnaround times and reduced manual intervention, resulting in quicker processing cycles of up to 95% straight through processing for clients.

Future-Ready Solutions: Through the partnership with TCG Process, INTEGRIM has positioned itself to embrace future advancements in automation technology ensuring that their automation capabilities will remain cutting-edge and adaptable to evolving industry trends and client needs.

Training & Support: To facilitate a smooth transition for clients, INTEGRIM offered training sessions and support to help them understand the new platform and its capabilities.

> "Our clients are very pleased with our 95%+ accuracy rate. We have exceeded all our benchmarks. TCG Process, DocProStar, has allowed our people to focus on more value-add activities. Now we are looking at how we can implement DocProStar into additional client solutions.
>
> *André Denis,*
> *President, Chief Delivery Officer & CTO*
> *INTEGRIM*

Transitioning suitable clients from the existing hard-coded document automation solution to the DocProStar platform has yielded significant benefits:

Agility
Now INTEGRIM can respond faster to changing client requirements by rapidly creating, modifying, and deploying automation processes.

Customization
Clients enjoy the flexibility of tailoring their document automation solutions to their specific needs, enhancing the value of the service.

Collaboration
Non-technical stakeholders could actively participate in the design & customization process, improving collaboration and communication.

Cost Savings
The need for specialized developers was reduced, leading to cost savings in development and maintenance.

Increased Productivity
INTEGRIM's clients now reallocate their workforces to more value-added activities, resulting in cost savings and increased employee productivity.

Standardization
INTEGRIM now offers standard packages ensuring consistency in service delivery while allowing for easy adaptation/ implementation.

Today, all new volume, two million+ files and growing, is going through INTEGRIM 's DocProStar solution. This equates to more than 50% of their current client base, with a goal of over three million by end of year.

The advanced technology from TCG Process, along with flexibility and alignment with INTEGRIM 's business goals, positioned them as an ideal partner to provide innovative and tailored document processing solutions.

For existing and new clients, INTEGRIM is now able to offer more agile, scalable, and customizable services. Through the creation of standard package offerings and incorporating customization capabilities, INTEGRIM has enhanced its competitiveness, improved customer satisfaction, and positioned itself as a leader in the document automation BPO industry in Canada.

Next the company plans to look at ways to use the platform to benefit their clients in marketing, finance, expenses and digital mailroom.

About INTEGRIM

Founded in 1992 and with offices in Canada and the United States, INTEGRIM ranks among the leaders in North America in document automation technology. INTEGRIM provides a comprehensive portfolio of business services and solutions, on-premise or cloud-based, such as SenSaaS! which enable companies to eliminate manual data entry and facilitate the digital processing and approval of documents through electronic solutions designed to support client IT and financial systems. These technologies provide for the automation of accounts payable, accounts receivable, payment control, sales order processing, travel and expense accounts, as well as HR contracts and files. INTEGRIM 's close cooperation with clients and partners is fuelled by our commitment and capacity to provide and deploy performance-oriented systems intended to support clients on their digital transformation journey. Our goal is to enhance resource efficiency, streamline document processing, reduce operating costs and drive client growth through the implementation of innovative technologies.

 www.INTEGRIM.com

About TCG Process

TCG Process, with headquarters in Switzerland, is an international organization that develops and integrates input management and intelligent process automation software. Its solutions are used in industries including banking, insurance, healthcare, government and public administration to digitize and automate document-driven processes. TCG Process sells both directly and via partners globally.

 www.tcgprocess.com

TCG

ENABLE THE DIGITAL ENTERPRISE

WWW.TCGPROCESS.COM