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“When staffing is a challenge, smarter processes are part of the solution”

How document automation helps organizations navigate workforce shortages.



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Introduction

Staffing shortages are affecting organizations across nearly every industry. Across many industries, experienced employees are retiring while demands for service quality, documentation, and regulatory compliance continue to increase.

The result is clear: fewer employees are expected to handle a growing workload. Organizations with highly document-driven processes are particularly affected by this development. Whether it involves government decisions, contracts, insurance policies, patient information, or customer communications, the creation, review, and management of documents consume a significant amount of valuable working time every day.

Document automation offers an effective solution to this challenge. It reduces manual effort, minimizes the risk of errors, and enables employees to focus on the tasks that truly create value.

The role of document automation

Document automation enables the automatic creation of documents based on pre-defined templates, data sources, and business rules. Content is maintained centrally and can be automatically adapted to recipients, specific cases, or legal requirements.

Benefits:

- Reduced manual effort
- Faster processing times
- Improved document quality
- Fewer errors
- Relief for existing teams
- Ensured compliance and corporate branding

Especially in times of limited human resources, automation can help organizations maintain or even increase their operational performance.

In my role as Head of Sales & Partner Manager Europe, I see every day that our customers' challenges vary significantly by industry and country. At the same time, certain recurring patterns clearly demonstrate the need for more efficient document and administrative processes across all sectors.

Public Sector

More citizen requests despite staff shortages

Municipalities, districts, and government agencies face a dual challenge: increasing case volumes and an aging workforce. Many public sector employees spend a significant portion of their working day creating letters, notices, forms, and informational documents. Over the years, many public administrations have developed complex IT landscapes. Different departments and business units often work with their own specialized applications, processes, and document templates. As a result, hundreds or even thousands of templates frequently need to be maintained in parallel. Every legislative change, form update, or revision of standard content requires significant maintenance effort. Managing and quality-assuring these templates quickly becomes a mammoth task that consumes considerable time and resources.

In numerous projects I have been involved in over the years, particularly within German public administrations, I have encountered these challenges repeatedly. Historically grown IT environments and a wide variety of specialized applications are common. Consequently, keeping templates up to date, consistent, and legally compliant requires significant effort. By centralizing template management, organizations can manage, standardize, and maintain templates securely from a single location. Combined with automated document generation that retrieves data directly from connected systems, manual effort can be significantly reduced.

The result is more consistent documents, shorter processing times, and meaningful relief for employees, allowing them to focus more on serving citizens' individual needs.

Insurance

Increasing efficiency without additional staff

Documents are at the heart of the insurance business. They provide the legal foundation for contracts, define claims and benefits, document agreements, and create transparency for customers and employees alike. Incorrect, incomplete, or outdated documents can have serious consequences, ranging from misunderstandings and delayed processing to compliance risks, financial losses, and loss of customer trust.

Insurance companies generate vast numbers of documents every day, including policies, contract amendments, claims correspondence, informational letters, and cancellation confirmations. At the same time, customers expect fast response times and communications that are accurate, understandable, and personalized. This creates the

challenge of managing large document volumes efficiently while meeting the highest standards of quality, compliance, and customer service. By automating document creation and integrating relevant data sources, insurers can accelerate processes while reducing potential errors.

As a result, they significantly increase productivity and free skilled employees from repetitive administrative tasks.

Banking

More customer advice, less administration

Documents also play a critical role in the banking sector. They are essential not only for the legally compliant documentation of consultations, agreements, and financial transactions but also for meeting regulatory requirements. Incorrect or incomplete documents can result in compliance violations, increased risk exposure, liability claims, and loss of customer confidence.

A considerable share of banking employees' working hours is spent on administrative tasks such as preparing contracts, advisory reports, loan documentation, and customer correspondence. These tasks are often time-consuming and prone to errors, consuming resources that could otherwise be dedicated to customer advisory services. Through document automation, standard documents can be generated automatically, customer data can be pulled directly from existing systems, mandatory text modules can be maintained centrally, and approval workflows can be digitized.

This reduces manual work, improves document quality and consistency, and ensures more reliable regulatory compliance. **The result: advisors gain more time for valuable customer interactions while efficiency, service quality, and legal certainty improve simultaneously.**

Healthcare

More time for patients

Documents are indispensable in healthcare. They ensure complete treatment documentation, support communication between departments, and provide the basis for billing, quality assurance, and legal documentation. Errors or omissions in healthcare documents can create administrative issues and delays and, in the worst cases, negatively impact patient care. At the same time, hospitals, clinics, and care providers face growing pressure. Workforce shortages continue to intensify, while documentation

requirements, compliance obligations, and regulatory demands steadily increase. As a result, physicians, nurses, and other healthcare professionals often spend several hours each day on administrative and documentation-related tasks. These include preparing discharge summaries, patient information sheets, consent forms, discharge documents, and numerous certificates and forms.

The situation becomes particularly challenging for organizations operating multiple facilities or care locations. Within our customer base, I frequently encounter organizations where each site has developed its own documents, forms, text modules, and templates over many years. While this may initially seem practical, it often results in a highly fragmented and difficult-to-manage template landscape. Changes to legal requirements, quality standards, or internal procedures must then be implemented across many locations simultaneously. In many cases, it becomes unclear which document version is current or which template should be used at a particular site. The result is increased administrative effort, process inefficiencies, and significant resource consumption in sectors already struggling with staff shortages.

By centralizing template management and automating document processes, all sites gain access to the same approved and up-to-date templates. Content, mandatory texts, and layouts are maintained centrally and become immediately available throughout the organization. When integrated with hospital, care, or administrative systems, existing patient and case data can be transferred automatically. This eliminates duplicate data entry, reduces errors, and considerably accelerates processes.

The result is higher document quality across all locations, reduced administrative workload, and more time for the core mission of healthcare and care organizations: delivering the best possible care and support to patients and those in need of assistance.

Conclusion

The shortage of skilled workers will continue to affect organizations for years to come. At the same time, expectations from customers, citizens, patients, and business partners regarding speed, service quality, and error-free processes continue to rise. Recruiting new employees is becoming increasingly difficult and expensive, making the efficient use of existing resources more important than ever. Document automation is therefore far more than a simple efficiency initiative. It is a strategic lever for relieving employees of time-consuming routine tasks, improving the quality and consistency of documents, and ensuring reliable compliance with regulatory requirements. By automating recurring processes, organizations can reduce workload, avoid errors, and maintain high service standards over the long term.

The examples from the public sector, insurance, banking, and healthcare clearly demonstrate that while processes differ between industries, the underlying challenges are remarkably similar. Everywhere, large volumes of documents must be created, maintained, updated, and managed in a legally compliant manner. Everywhere, valuable resources are tied up by manual document processes. And everywhere, outdated templates, fragmented systems, and manual errors create additional workload and risk. For this reason, the benefits of document automation can be transferred to many other industries, from utilities and housing associations to educational institutions, manufacturing companies, and service providers. Organizations that automate their document processes today create capacity for the activities where human expertise, creativity, and personal advice truly make the difference.

Digitalization thus becomes more than a tool for improving efficiency. It becomes a key building block for the long-term sustainability and future readiness of the entire organization.



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