

# Shaping the Future of Document Workflows

Discover how new software can improve document security, collaboration, and efficiency for highly-regulated industries.

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E-BOOK



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# SECTION 01

## SECTION 01

# Spend Time on the Work That Matters Most with Technology That Delivers Exceptional Service

Every day, businesses like yours create, share, edit and sign documents. You send contracts to clients to approve, co-edit proposals with colleagues and review invoices from external vendors. These processes, known as document workflows, enable companies to collaborate with partners, share ideas and services with customers and remain transparent with industry regulators.

For service-based businesses that spend a lot of time interacting with clients, the need for signatures, document collaboration and file sharing isn't going away. However, how these document workflows are handled is transforming.

As businesses seek new competitive advantages, document workflow processes are emerging as a differentiator. Optimal document workflows use automation and AI to boost productivity and accuracy, empowering employees to focus on what they do best—delivering exceptional service and finding fulfillment in the work that truly matters.



# SECTION 02

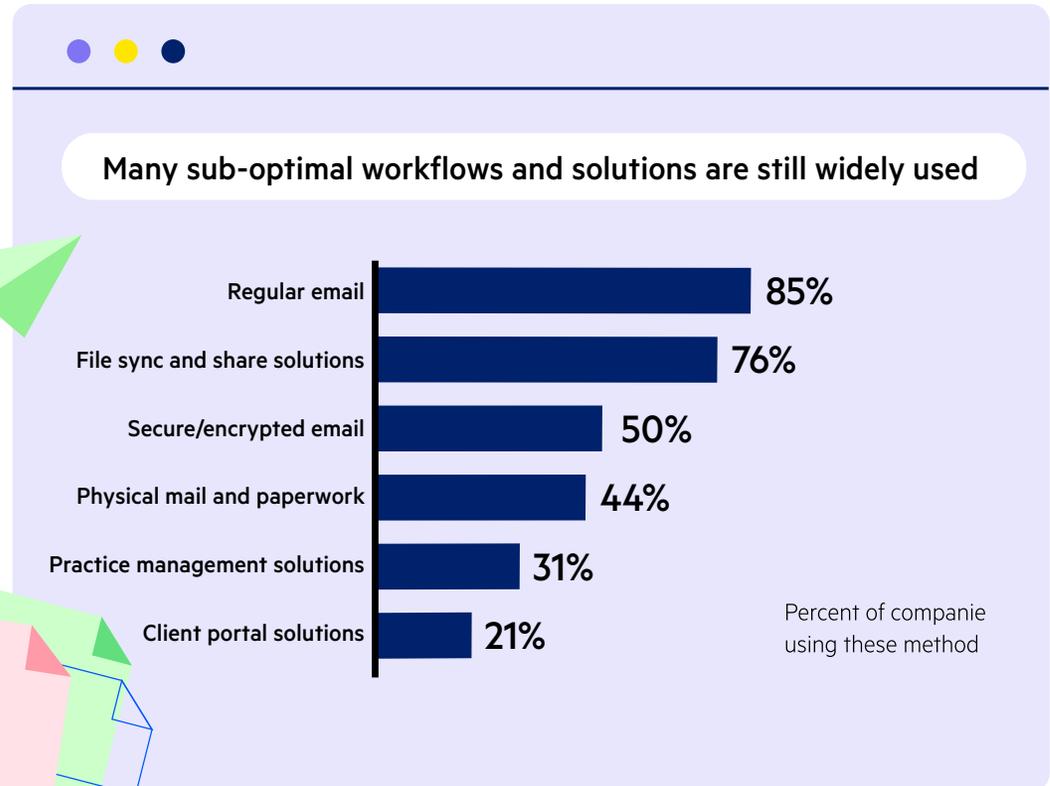


## SECTION 02

# The Current Document Process Slog is Weighing Down SMBs

Traditional methods for managing files, like emailing confidential documents, using separate electronic signature (e-signature) tools or building frequently used forms from scratch, are becoming sub-optimal and repetitive. These methods are slower, more prone to security breaches and do little to provide customers with seamless digital interactions.

For small- and medium-sized businesses (SMBs) with lean teams and limited resources, suboptimal document processes can be detrimental.



**Source:** Survey of 398 professionals (at companies with at least 5 employees) in North America and Western Europe involved in the decision-making around secure document automation and collaboration solutions. Conducted using a B2B market panel by a B2B market panel under the banner of general market research. All respondents were compensated for their time by research panel providers.

### Current methods don't offer comprehensive features that let you get the job done

Methods	Secure File Sharing		Advanced Workflow and Portal		
	Secure file sharing	Content	E-signature	Automated workflows	Client portal
Regular email (e.g., Outlook)	X	X	X	X	X
Secure and encrypted email (e.g., Proton)	●	X	X	X	X
File sync and share solutions (e.g., Dropbox)	●	●	X	X	X
Practice management solutions (e.g., Canopy)	X	●	X	●	●
Client portal solutions (e.g., Liscio)	X	●	X	●	●

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### Processes may be sub-optimal if they:

- Include manual and/or redundant steps, like filling out new client forms
- Require multiple applications to complete a task, such as separate apps for document management, e-signature, CRM and file encryption
- Lack adequate security to protect personally identifiable information (PII) and intellectual property from security breaches
- Provide limited visibility into document status, such as whether a client opened a file or if a document received the right approvals to move forward

Continuing to use these methods wastes valuable time on low-value tasks, increases the risk of human error, and delivers outdated experiences to customers seeking something more modern. Your employees must navigate unnecessary risks that affect their ability to work productively.

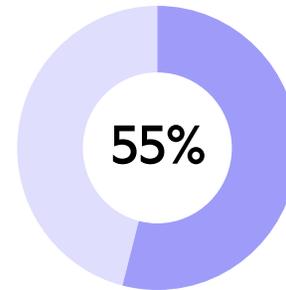
# More Sophisticated Cybercriminals Make the Case for Stronger Security Measures

Cloud-based solutions like Outlook, Gmail, Google Workspace, and Microsoft 365 make document management more digital but come with data privacy concerns.

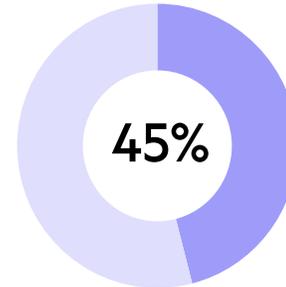
Rising cyberattacks and growing [data sprawl](#) issues make security a necessity when collaborating with teams and clients. Attacks often originate from access control points in systems lacking strong security protocols such as encryption and automated audit trails.

*Source: Survey of 398 professionals (at companies with at least 5 employees) in North America and Western Europe involved in the decision-making around secure document automation and collaboration solutions. Conducted using a B2B market panel by a B2B market panel under the banner of general market research. All respondents were compensated for their time by research panel providers.*

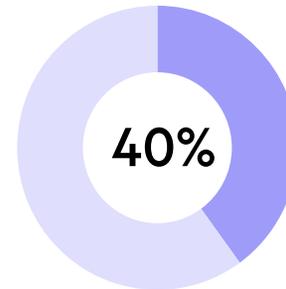
Organizations are adopting secure document automation tools to:



**Increase security in transferring files externally**



**Automate manual processes**



**Increase ease of compliance with regulatory bodies**

# A Lack of Efficiency and Productivity Demands Automation

Inefficient document workflows waste time, cause errors and make teams less productive. When teams have clear standards to guide customer touchpoints, document versioning and approval workflows, they're able to work more efficiently and drive better client experience.

# 47%

of businesses are looking to digitally transform document workflows to streamline operations, elevate internal efficiency and process management and improve employee performance and productivity.

## Top drivers of digital transformation



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## Data paints an even clearer picture of the reality of poor document workflows:

47%

of employees who use digital technology for work [struggle to find the information or data needed](#) to perform their jobs.

3.6

hours per day represent how much [time on average, employees spend looking for information.](#)

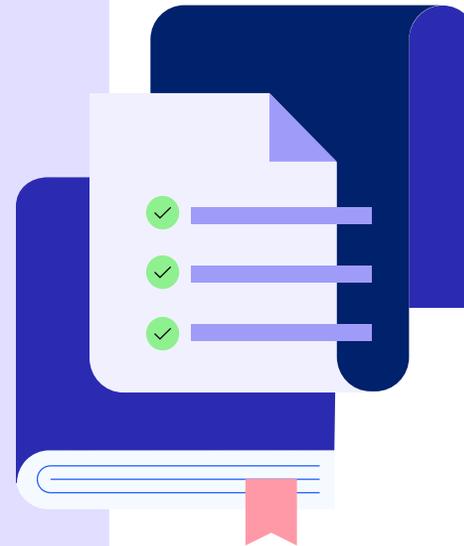
51%

of CIOs say [legacy workflows impact productivity](#) across departments.

125

is the [average number of SaaS applications](#) an organization has within its tech stack. More tools add more steps for employees and clients alike, meaning clients may abandon IT-approved applications for ones that offer an easier experience.

Despite these challenges, [nearly half](#) of SMBs still rely on manual and sub-optimal file collaboration and sharing methods. SMBs need to be strategic about where and how they spend their time, especially those facing pipeline shortages. Automation is the path forward for collaborative internal project development from the first signature to final delivery.



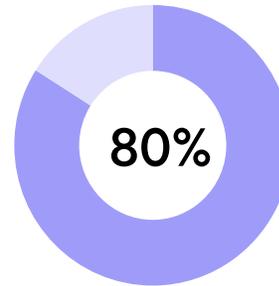
# The Need to Improve Client Experiences Is Propelling Digital Transformation

Customers increasingly expect seamless, user-friendly digital experiences—and it's up to SMBs to provide it. When you don't, you risk repeat business and your bottom line.

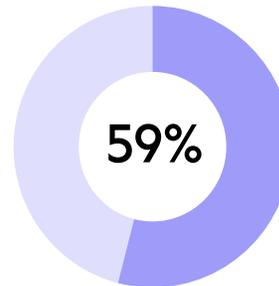
Improving client interactions elevates their experience. Rather than spending time sorting through email threads, searching for files manually or chasing down approvals—your employees can spend their time focused on delivering exceptional, personalized service to each client.

Faster, more accurate interactions help build trust and transparency with clients. In turn, clients are more likely to keep doing business with you and refer you to their friends and family in the future.

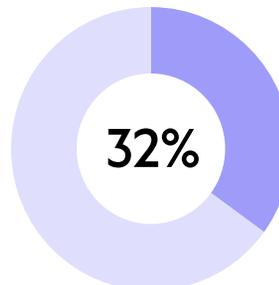
One of the most impactful ways to deliver these types of experiences? **Technology.**



regard the experience a company provides as just as important as its products or services.



will walk away from a business after several bad experiences.



will stop doing business with a brand they love after one bad experience.

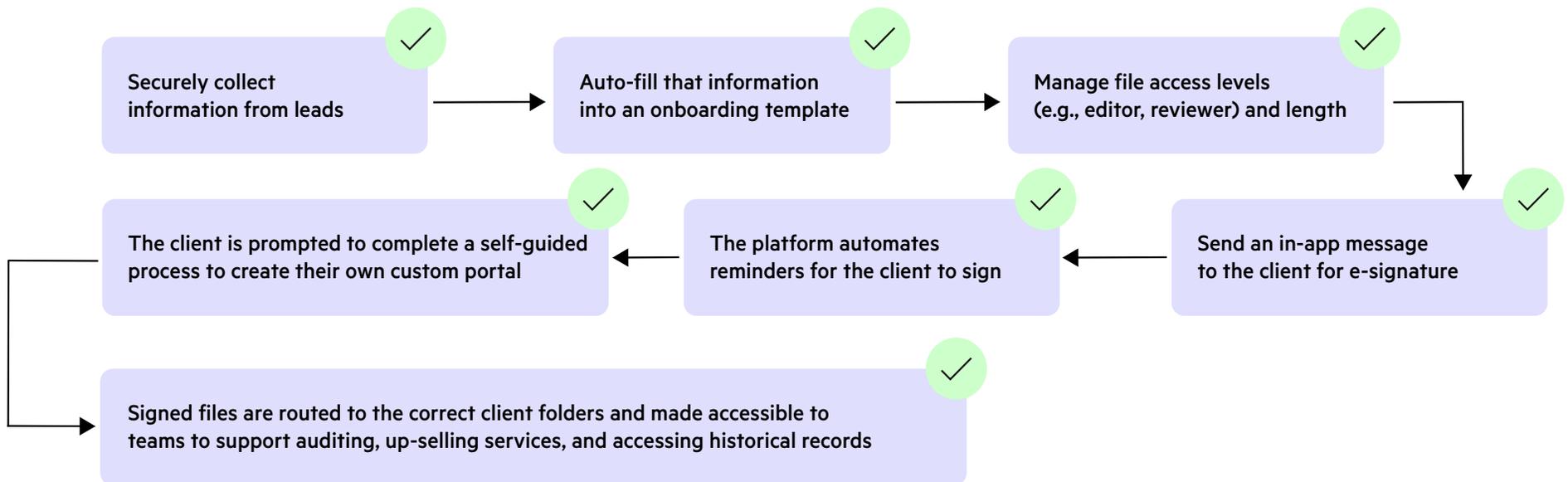


# SECTION 03

## SECTION 03

# Trade in old habits for new technology

Businesses across industries are beginning to use technology to automate and manage document flow within projects, departments or organizations. Document workflow software integrates e-signature, document collaboration, client access and encryption together in one solution. Files can easily flow from creation, to approval, to signature, to storage, without ever leaving the app.



When document workflows are optimized, SMBs can control granular levels of content access, free up employees to focus on strategy and keep work flowing without interruption.

# 85%

of respondents in an IDC survey said improved employee experience had a [direct tie to revenue increases and heightened customer experiences.](#)

# 61%

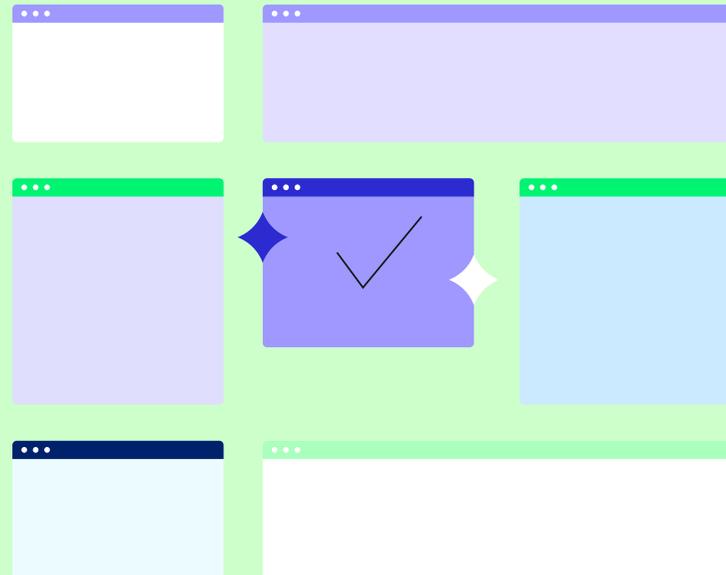
of CIOs noted that fully digitizing workflows and internal processes would [enable employees to focus on strategic work over tactical tasks.](#)

# 75%

of businesses that implement workflow automation report [saving more than four hours per work week.](#)

# 33%

of CIOs think digital workflows are likely to [lower costs and significantly help support data security and compliance.](#)



# What you Need to Know About Document Workflow Software

Document workflow software helps businesses like yours automate, track and manage the document request, creation, sharing, approval and storage process. In recent years, it's gained traction because it simplifies document security and compliance across industries. With this solution, you can help the right people access critical files at the right time, in the right capacity, across entire workflows or groups of workflows.

## Transform Your Document Workflows with These Six Software Benefits

- 1. Save time and money:** Automating the document workflow process lets you deliver services faster by enabling teams to fulfill requests, find files, onboard and collaborate more seamlessly. For businesses that still rely on paper-based workflows, it also reduces paper, printing and physical-filing costs.
- 2. Improve the client experience:** Streamlining document workflows helps minimize common human errors, like sending the wrong file to the wrong client. When teams manage documents consistently and accurately, clients are more likely to trust and feel confident doing business with you.
- 3. Help prevent cyberattacks and privacy violations:** How you manage and share documents is critical to your long-term success, [with 75%](#) of consumers reporting they would stop doing business with a company following any type of cybersecurity issue. Using software that has end-to-end encryption and is built to maintain audit trails and secure file access will help you avoid costly privacy violations and cyberattacks while maintaining compliance support.
- 4. Enhance collaboration:** Working in the same document at the same time speeds up processes, eliminates version-control issues, and keeps projects on schedule. Real-time collaboration features make it easy for multiple users to find, edit, approve and share files securely with colleagues, partners, vendors and clients.
- 5. Boost productivity:** Automating repetitive and routine tasks, such as document preparation, app switching and approval tracking, gives your employees more time for strategic, high-value work. When your employees can spend time doing work they enjoy, they are more likely to produce better-quality outcomes.
- 6. Refine scalability:** Seamlessly adapting to increased document volume or complexity makes your business better poised for expansion. Avoid spending money on future software and related team training/ onboarding by investing in software solutions that can grow with your business.

# Don't Wait to Digitally Transform Your Document Workflows

For companies in regulated industries, having a single, secure source of truth for all files and data can be a powerful differentiator. SMBs looking to condense current tech stacks need software that can handle multiple functions.

Document workflow software can manage entire workflows for you, start to finish. Which makes finding the right solution for your unique needs so important. What would your work day look like if your technology solution automated things like signature collection, file sharing and onboarding?



# Support End-to-End Workflows with an Automated Solution That Does It All

## Signature Collection



**Why you need it:** Makes it quick and easy for teams to request and clients to sign-off on necessary documents and approvals, helping minimize the potential for legal complications.

**How it works:** Draft, send and collect, signed agreements securing consent to terms and conditions, such as scopes, fees, timelines and project responsibilities. Encryption, e-signature solutions and automations for activities such as sending follow-up emails, sharing and filing documents and implementing passcodes for document access should be baked into the solution you use. As an example, when someone applies for a new insurance policy, an agent can send files directly from the system for the new client to safely view, sign and return. Scheduled reminders help agents collect signatures quickly, while giving new clients the chance to sign when it's convenient for them.

## Client Onboarding



**Why you need it:** Makes it quick and easy for teams to request and clients to sign-off on necessary documents and approvals, helping minimize the potential for legal complications.

**How it works:** Get started with collecting client data and setting up account access in the client portal. Then you can educate the client on processes and set expectations for ongoing communication. Access to client portals lets you seamlessly deliver up-front materials that may be needed before kick-off and creates a secure environment for co-working. Lawyers often use the client onboarding process to confirm there won't be a conflict of interest before taking on a case

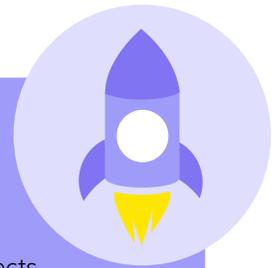
## Document Preparation



**Why you need it:** Creates and customizes documents quickly and easily that can be used repeatedly in your business.

**How it works:** Develop templates for regularly used documents like contract agreements, invoices, reports and client renewals. Features like signing order let you specify all stakeholders who need to sign a document and the order in which they need to receive and sign. Variable functions are critical so you can automatically paste data from third-party applications, rather than having to manually input that information yourself. Think about tax season and the engagement or re-engagement letters an accounting firm needs to send clients for tax return preparation. Accountants can easily set automations to send engagement letters to each client, prompting swift signatures so work can start.

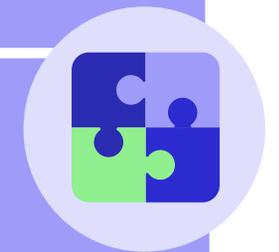
## Project Launch



**Why you need it:** Allows your team to launch new projects quickly with preconfigured tasks, document and information requests and tables.

**How it works:** Elevate the client experience in two ways—save time with pre-built launch templates and standardize workflows by sharing those templates across your teams. Consider the check-in process at a hospital or doctor's office. Standard templates and automations can use specific information, such as patient name, insurance provider and date of birth, to quickly find appointment details and check patients in. Doctors and medical staff can engage with and treat patients more promptly. Less stress around check-in and filing can also mean more face-to-face time for doctors and patients.

## Client Cooperation

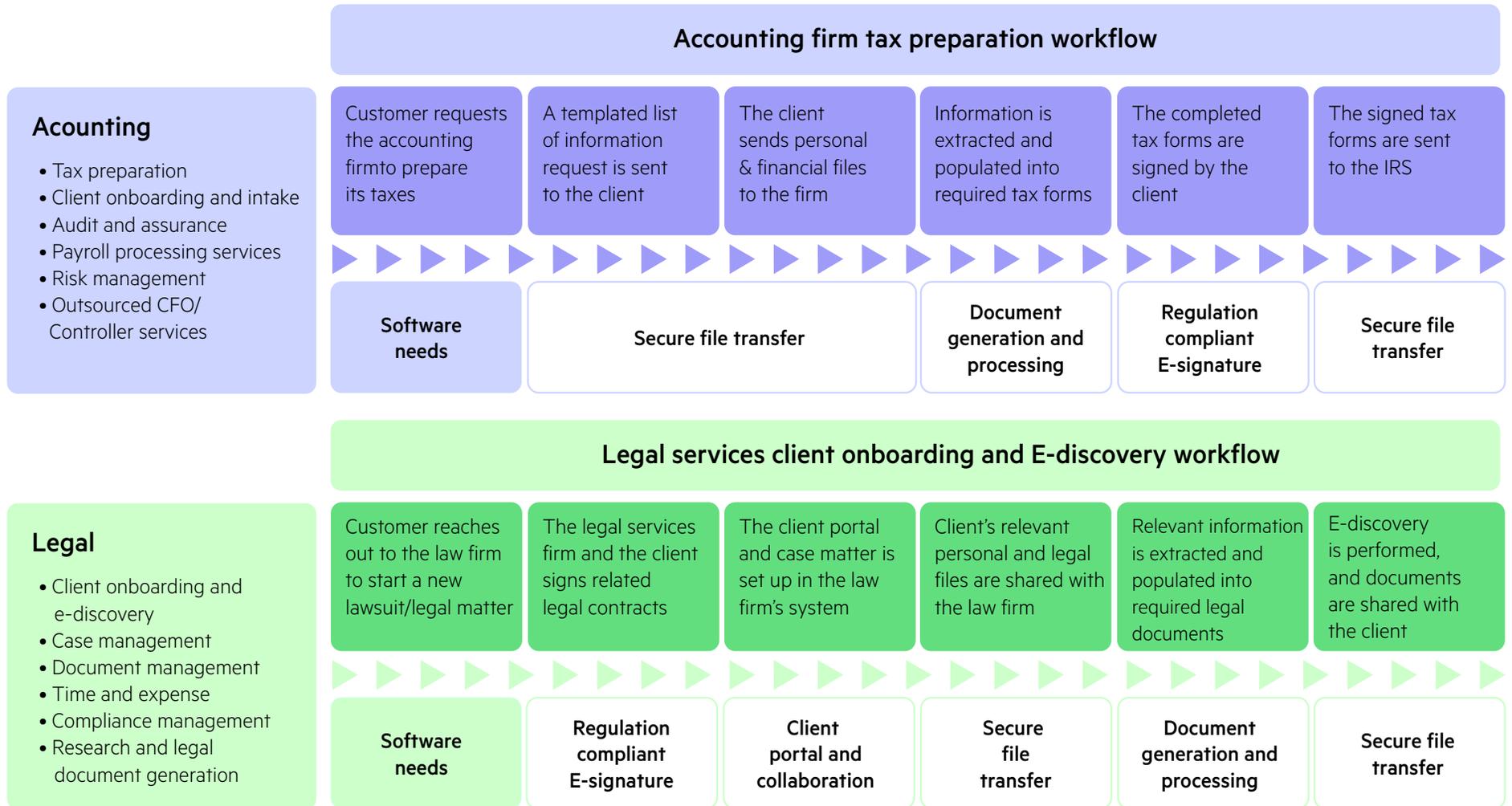


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# Document Workflow Software Goes to Work for you By Automating Entire Workflows

## Examples of workflows and software needs



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# Protect Against Security Risks with Automation and Integrations

Having access control over files, portals and data and signature collection is an important part of successful workflows and client relationships. You need to be able to quickly detect and act on possible threats. With automation, document workflow software can do this for you.

Auto-remediation tools featuring AI functionality monitor for potential threats and alert teams the moment an event is detected. For instance, say someone is trying to access a file or group of files from multiple IP addresses at the same time. The system can detect this, block the action and force a password reset to mitigate privacy and security risks. No more relying on delayed notifications or waiting for reports—these systems help automate solutions if threats emerge.

When files are in transit and at rest, encryption helps maintain document security and access permissions. Document workflow software that integrates seamlessly with email applications like Outlook provides added security for email attachments and copies or content included within email messages, such as signature request buttons.

Consider solutions with built-in activity and security alerts, as well as real-time updates. These are important features that help you respond to situations fast and with appropriate next steps that fit specific needs. You'll need regular audits to maintain data security, stay ahead of emerging risks and scale to meet evolving compliance requirements for your industry.

Progress® ShareFile® software has the features and capabilities you need to help you get back to doing what you do best.

Key Feature	Included with ShareFile software?
Signature collection / e-signature capabilities	●
Client onboarding and portals	●
Document preparation and information requests	●
Collaboration spaces	●
Auto-remediation	●
Encryption	●
Access controls	●

# SECTION 04



## SECTION 04

# Get Back to what Brings Joy at Work with Software That Digitizes what Doesn't

Selecting a system to [manage your document](#) workflows is a big decision. Your choice will directly affect your business's productivity, efficiency, security and compliance.

Look for strong systems with encryption, access controls, integrations and compliance support—all key features that many organizations are currently missing.

With the right technology platform, your team will be more productive, maintain proper security protocols, improve client interactions and ultimately boost ROI. Not to mention, teams can get back to more fulfilling work that positively impacts the business.

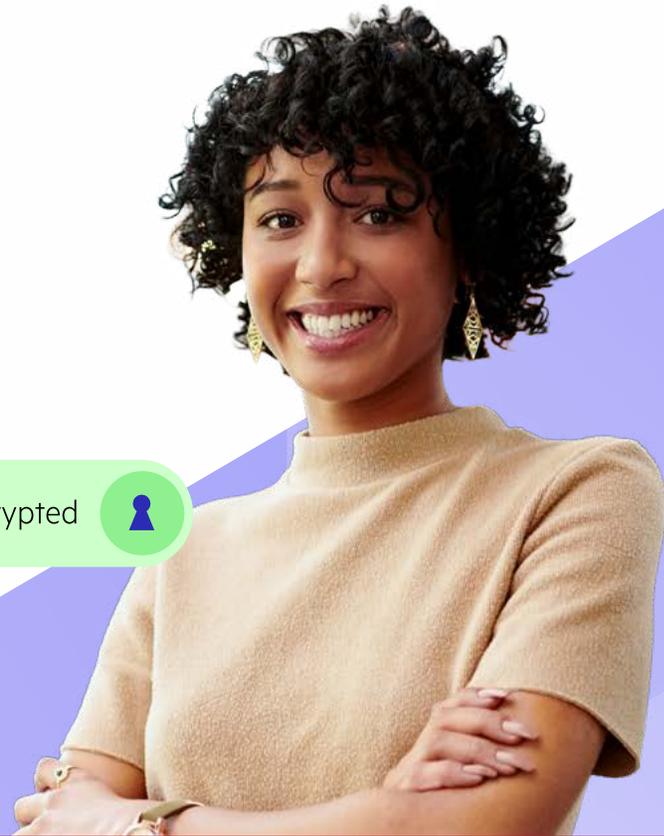


# Take the Next Step Into the Future of Document Workflows

Having a streamlined document workflow process gives your business access, control and governance over all the documents and files needed for optimal productivity and outcomes. Investing in document workflow software today is an investment in both the short- and long-term success of your business.

Progress ShareFile offers the technology and support that businesses in highly regulated industries need to be successful. Streamline document processes, meet client needs, boost productivity and reduce costly errors with the solution purpose-built for highly-regulated, document-heavy industries. Document workflow software can transform business operations, saving time and money while keeping you competitive in a rapidly evolving market.

Encrypted



Find out how Progress ShareFile can help take your business to the next level

## About Progress Software

[Progress Software](#) (Nasdaq: PRGS) empowers organizations to achieve transformational success in the face of disruptive change. Our software enables our customers to develop, deploy and manage responsible AI-powered applications and personalized digital experiences with agility and ease. Businesses of all sizes get a trusted provider in Progress, with the products, expertise and vision they need to turn AI disruption into a competitive advantage. Millions of developers and technologists at hundreds of thousands of organizations depend on Progress every day. Learn more at [www.progress.com](http://www.progress.com)

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