



Market Momentum Index:

Intelligent Document Processing (IDP) Survey 2025

Research by Deep Analysis in partnership with AIIM

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Introduction

AIIM, in association with Deep Analysis, is undertaking this survey to gain a deeper understanding of how buyers and users of IDP (Intelligent Document Processing) approach this technology, the opportunities that AI (Artificial Intelligence) open up - and the challenges of implementing IDP and delivering business value.

Intelligent document processing (IDP) software uses AI to enable a computer to read documents and extract data from them. It replaces older software such as document capture or OCR. IDP can be a standalone product or part of a larger software solution; this survey applies to both.

For this project, 600 enterprises were interviewed by questionnaire; based in the United States, Germany, Austria, and Switzerland, with revenues over \$10 million, headcount over 500 employees, and operating in a selection of key industries.

Quantitative research data was collected during May 6-21 2025 and analyzed during May 21-26. Full details of the data collection, sampling criteria, and other associated information can be found in the methodology section of this report.

For success with AI, the report shows the importance of managing unstructured data across a growing multitude of systems; the need for enterprise automation and a holistic, end-to-end approach to workflow automation; the need for process mining to surface opportunities for AI improvements; and the still-prevalent need to leverage (and potentially) transform paper-based process.

The well-established practice of information management is the answer to the new needs of the AI era.

AI and unstructured data management aren't just partners—they're a powerhouse duo. This research isn't merely informative; it's a call to action. Use these insights to transform your organization's approach, turning data complexity into AI-driven advantage. The future favors those who excel at both.



Tori Miller Liu, MBA, FASAE, CAE, CIP
President & CEO

Association for Intelligent Information Management (AIIM)



Executive Summary and Key Findings

The *Market Momentum Index: Intelligent Document Processing (IDP) Survey*, conducted by Deep Analysis with support from SER Group, DocuWare IDP, Infocap, Pyramid Solutions, reveals that **AI is driving a new wave of massive growth and disruption, with 65% considering a new project — and 66% of those planning to replace a legacy system.**

The survey revealed additional key findings that are summarized here.

- **Huge Adoption Shift: 78% of companies are operational with AI;** a dramatic leap forward. Just a year ago, stalled projects and concerns about new AI caused many to predict this was just another hype cycle that would amount to a tiny bit of actual change. The data now suggests that the trend has shifted dramatically – at least for IDP projects.
- **High Vendor Turnover: 66% of new IDP projects will replace an existing system;** a staggering number in a mature industry. The rise of GenAI and LLMs has disrupted the market. Innovative startups and scale ups will continue to take market share, while legacy vendors loaded down by technical debt will struggle to catch up.
- **Data Security & Privacy is the #1 Challenge:** The biggest hurdle for IDP implementation is **the security and privacy of the data that will be processed.**
- **Major shift from IDP's traditional invoice processing use case: Licenses and Permits, Know Your Customer (KYC) onboarding docs, Contracts/Agreements, and Human Resource Files are all on the rise,** proof that IDP has expanded rapidly beyond its traditional invoice and claims processing back-office functions and into front-office, customer-facing operations.
- **External Users Surge: 62% of IDP systems now involve external users,** confirming the significant shift toward front-office applications as hyperscalers offered low-cost, efficient cloud processing for customer service and onboarding workflows.
- **GenAI research is reshaping how customers choose a vendor.** While customer references and analyst reports still rank high, **GenAI research is now the #1 method for finding an IDP solution.** This is a radical change in a very short time, and vendors must adapt their websites and online content for AI-powered search.
- **Paper is far from dead. 61% of IDP processes still include paper documents;** a shocking number for 2025. Even more startling, **48% expect paper volumes to increase next year.**

Methodology

Quantitative data for the *Market Momentum Index: Intelligent Document Processing (IDP) Survey* was gathered via a set of panel questionnaires conducted anonymously within 600 enterprises in the USA and Europe.

The quantitative data panel was created from self-identified respondents matching the following profile, with no weightings unless specified:



Geographical Profile:

- USA – 75% (450)
- Germany – 17% (102)
- Switzerland – 4% (25)
- Austria – 4% (23)



Industry Profile (equally weighted within sample):

- Financial Services – 21% (123)
- Manufacturing – 18% (108)
- Energy & Utilities – 18% (102)
- Healthcare Insurance – 16% (98)
- State or Federal Government – 15% (87)
- Credit Union – 14% (82)



Financial Profile: [annual revenue criteria]

- Less than \$10m – 0% (0)
- \$10m-\$49.9m – 11% (66)
- \$50m-\$99.9m – 15% (91)
- \$100m-\$499.9m – 34% (205)
- \$500m-\$999.9m – 21% (128)
- \$1B+ – 18% (110)



Size Profile: [full time employee headcount criteria]

- 1-499 – 0% (0)
- 500-999 – 31% (185)
- 1000-4999 – 46% (275)
- 5000-9999 – 13% (80)
- 10000+ – 10% (60)



Employment Role:

- C-Level (CEO, CIO, CTO, CDO, etc.) – 21% (124)
- VP-Level – 24% (142)
- Director-Level – 38% (230)
- Manager-Level – 15% (90)
- Supervisor or Team-Level – 2% (14)



Decision-making Role:

- CEO or COO – 35% (212)
- CFO – 23% (139)
- CIO – 12% (70)
- Other C-level title – 4% (26)
- VP-Level – 9% (51)
- Director level – 12% (71)
- Manager level – 5% (31)



Organizational Structure:

- IT – 70% (418)
- Finance – 10% (57)
- Business Administration – 4% (22)
- Marketing/Sales – 3.2% (19)
- Accounting – 2.5% (15)
- HR – 2.5% (14)
- Customer Service – 2% (12)
- Product Development/Engineering – 2% (11)
- Facilities Management – 1.5% (9)
- Records/Information Management – 1.4% (8)
- R&D – 0.7% (4)
- Legal – 0.3% (2)

Analysis of Research Data

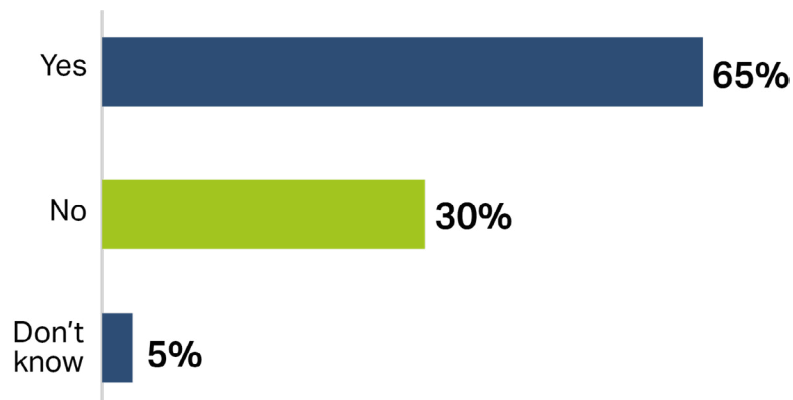
This inaugural version of the *Market Momentum Index: Intelligent Document Processing (IDP) Survey*, conducted between May 6 and 21, 2025, was conceived with the support of SER Group, DocuWare IDP, Infocap, Pyramid Solutions, to reveal the trends and issues of the use of IDP software.

As discussed in the Executive Summary/Key Findings, many areas of interest were uncovered during the quantitative research that help illustrate the current situation within the selected sample of organizations, verticals, and roles/departments. In this section, we expand upon those areas of interest, with selected illustrative charts providing additional insights.

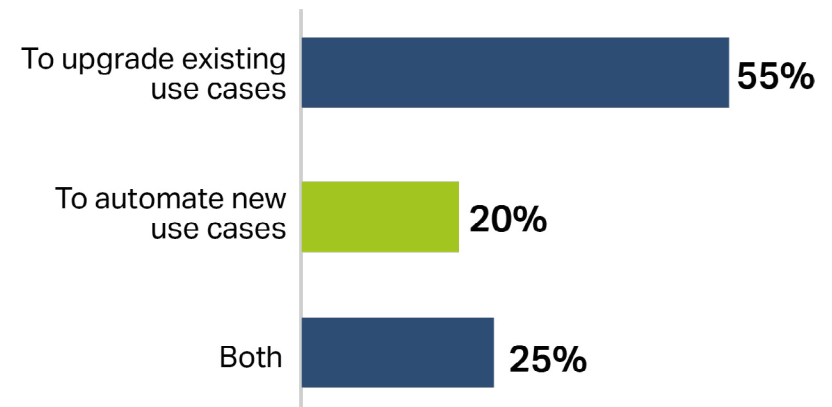
1. GenAI is driving a new wave of massive growth and disruption

We asked a series of questions to uncover future use patterns for IDP.

Do you have or are you considering a new IDP project?



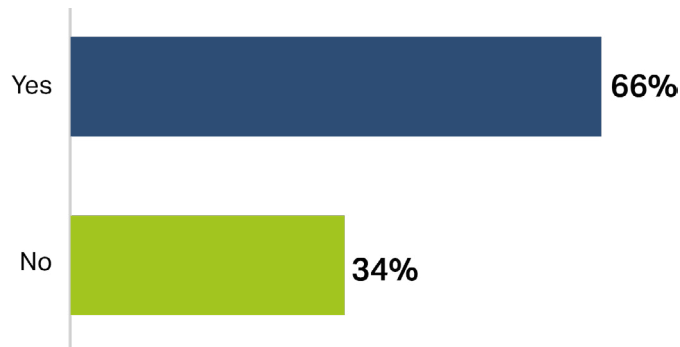
What is the purpose of your new IDP project?



65% said they have or are considering a new project, indicating a massive increase in IDP technology. Of that group, 45% plan to automate a new use case, an extraordinary result for a mature technology. This finding supports the thesis that GenAI capabilities are unleashing new use case potential, especially in front-office or customer-facing applications.

We then asked if the new project would replace an existing IDP system.

Will the new IDP project replace an existing IDP application?



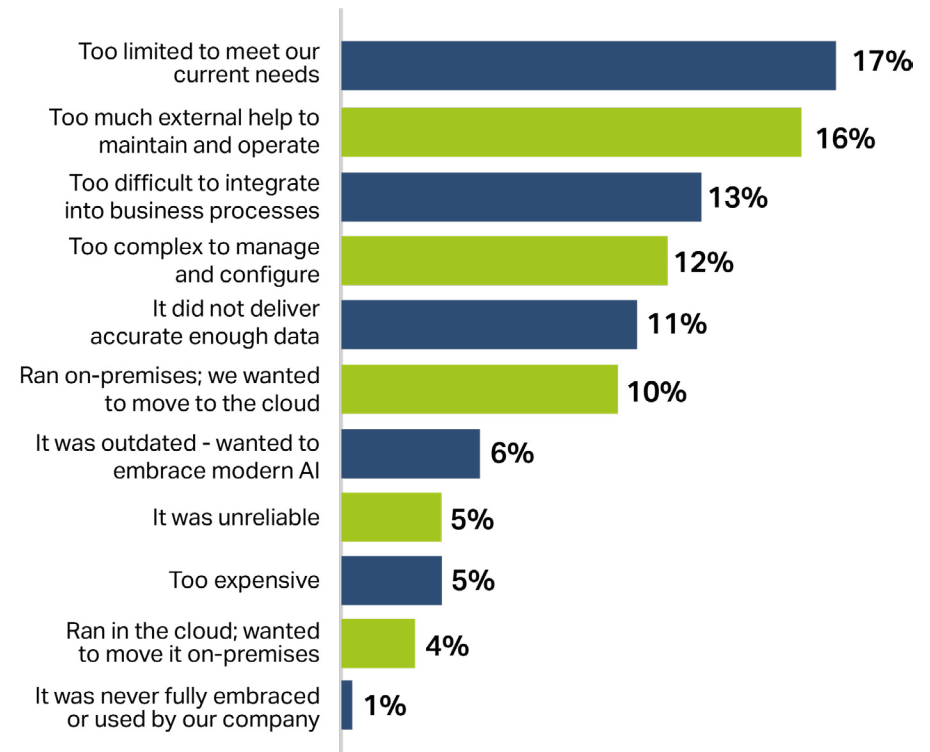
66% is an incredibly high turnover rate for a mature technology, and this data finding should be a wake-up call to every customer and every IDP vendor.

We believe LLMs (and the resultant GenAI functionality) are the main cause of this disruption. Since 2017 – the year Google introduced the transformer AI method behind LLMs – over 100 startups have entered the IDP market offering new functionality and time-saving efficiencies such as zero-shot or few-shot model training, and natural language user experiences.

The incumbent vendors have struggled to keep up with the pace of innovation, restrained by two main factors: 1) an installed base that is slow to change its IDP technology within crucial business operations and workflows, 2) legacy products weighed down with considerable technical debt.

Finally, we asked *why* they would replace the incumbent system.

What is your main reason for replacing your old system?

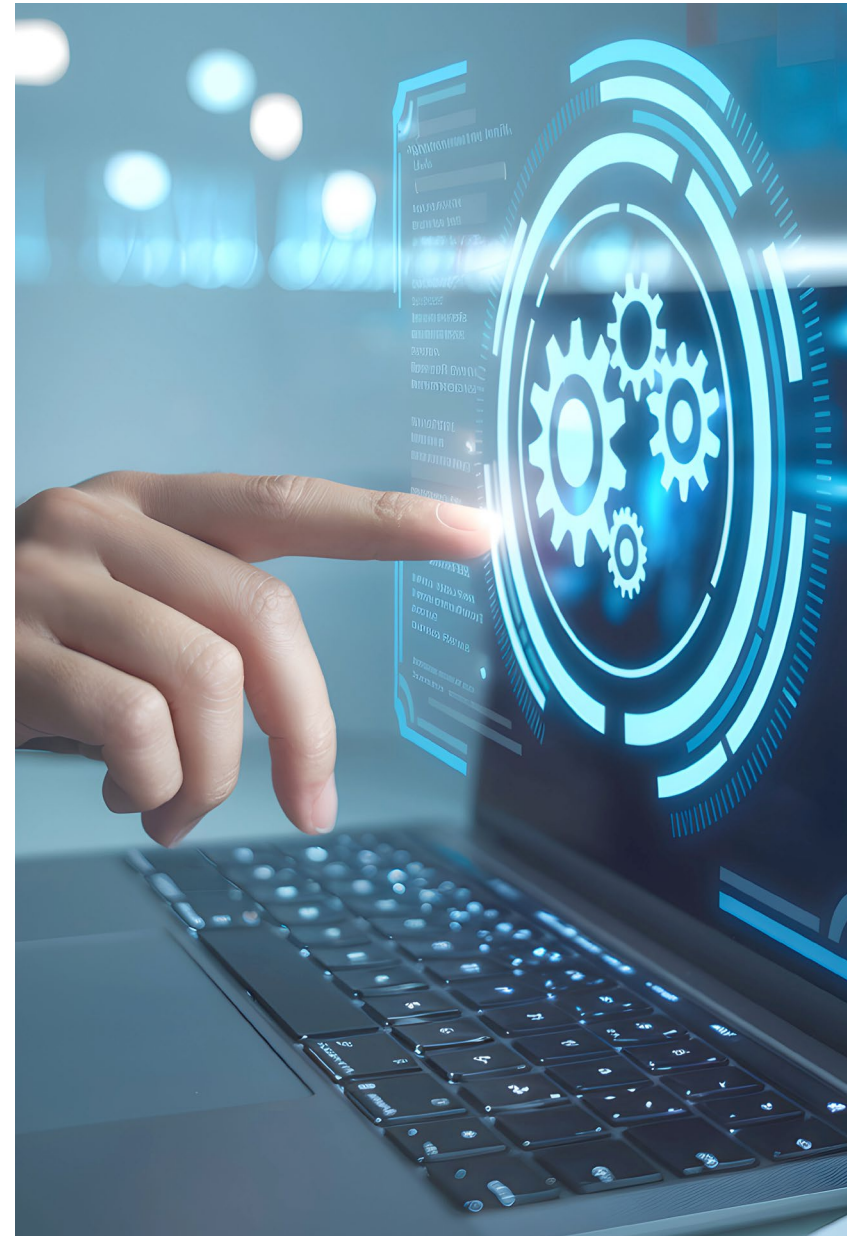


The top response was *Too limited to meet our current needs* followed very closely by *Too much external help needed to maintain and operate*. Both of these issues play into the perceived strengths of new GenAI-enhanced products.

The third highest response (*Too difficult to integrate*) supports another finding that integration with existing systems is a significant hurdle to IDP adoption. Help may be on the way. If the actual results come anywhere close to the promise, Agentic AI with its interoperability protocols such as MCP (Model Context Protocol, an open standard developed by Anthropic for AI agents to interact with tools and data sources) and A2A (Agent2Agent, Google's protocol for AI agents to communicate with each other, securely exchange information, and coordinate actions on top of various enterprise platforms or applications) could – at least in some use cases - make IDP integration much easier.

In addition, IDP offerings are being baked directly into enterprise software stacks and this could also solve many integration problems. For example, Salesforce, ServiceNow, SAP, Oracle, Microsoft Office, and other enterprise players recently introduced their own IDP products with the promise of seamless integration. Process automation, IDP and ECM vendors are also offering IDP integrations to other systems and databases.

Other reasons were ranked lower than expected. For example, only 5% would change because the existing system was too expensive, while only 10% wanted to move from an on-premises system to the cloud.



2. Huge Adoption Shift towards AI

78% of companies say they are operational with AI.

This represents a dramatic leap forward.

Regarding the use of AI technology to automate document processes, at what stage would you place your organization?

Accelerated (Adopting AI into many of our day-to-day functions, continuously seeking new cases.)	38%
Operational (We have begun to adopt AI into some of our day-to-day functions.)	31%
Experimental (Experimenting but haven't deployed any large-scale projects yet.)	13%
Transformational (AI is built into the DNA of our business and into almost all of our day-to-day functions.)	9%
Motivated (Excited about technology but haven't used it yet, seeking use-cases.)	6%
Concerned (Risk-averse, searching for where this can go wrong.)	2%
Skeptical (Wait and see.)	1%

Just a year ago, stalled projects and concerns about new AI caused many to predict this was just another hype cycle that would amount to a tiny bit of actual change. More recent market information confirmed that many AI projects are still on hold or at risk of abandonment.

This data thoroughly contradicts that. *AI adoption is very strong for document processing projects.* It also suggests that document automation may be the lowest of low-hanging fruit on the AI tree, the place where companies should invest to quickly demonstrate value for their AI investments while other projects take longer to develop.

There is another factor that may influence this unusually high AI adoption rate: the "I" in IDP stands for "artificial Intelligent". Any company that installs and deploys IDP has adopted AI in one form or another. IDP product development is a long trail of AI experimentation and innovation. Machine learning (ML) models have been used in some IDP products since the mid-2000s. AI computer vision tools have been widely deployed for IDP since the early 2010s. For IDP, GenAI is simply the newest, shiniest tool and developers have quickly integrated it.



3. Data Security & Privacy is the #1 Challenge

Participants were asked to rank their top three concerns about implementing IDP. We provided a list of the following common concerns plus an option to name their own.

- Implementation cost
- Integration with existing systems
- Data security/privacy
- Change management/staff adoption
- Accuracy/reliability of extraction
- Vendor lock-in
- Ongoing maintenance costs
- Other (please specify)

The survey revealed that the biggest hurdle for IDP implementation is **the security and privacy of data**.

What are your top 3 concerns about implementing IDP?



IDP projects are diverse and handle a wide variety of secure and confidential documents that might contain personally identifiable information (PII), medical records, valuable secrets, and other information that must be protected by law. This has been a prime concern since the advent of the cloud and was driven even higher by the revelation that GenAI makers were training their LLMs on proprietary data.

Every company must carefully investigate how an IDP solution will use its data and where that data will be stored. For many use cases, IDP vendors offer a private cloud option that can meet the requirements. However, many companies cannot or will not expose certain data to any cloud storage or cloud AI; accordingly, some IDP vendors offer on-premises solutions with AI models that can run behind the company's firewall. In that scenario, private data never leaves the premises and is used only to train the AI models for that company.

The 2nd leading concern is *Integration with existing systems*. The rise of Agentic AI with interoperability standards such as MCP and A2A could – at least in some use cases - make integration much easier. IDP offerings baked into an enterprise software stack, another trending development, could also solve many integration problems. Salesforce, ServiceNow, SAP, Microsoft Office, and other enterprise players have recently introduced their own IDP products with the promise of seamless integration.

In 3rd place, *Accuracy and reliability of data extraction*. Since this is the core functionality of an IDP system, it is no surprise this ranked in the top three. The ROI of an IDP solution is directly correlated to the accuracy of the data it provides to the enterprise. Data accuracy is a complex proposition that goes far beyond the rather simplistic claims put forth by vendors of "99.5% accuracy". As with automobiles, your mileage may vary. Accuracy and reliability encompass several components: character level, word level, field level, thresholds, document classification, context awareness, validation against a source of truth, straight-through processing, exception handling by a human in the loop, and more.

4. Major shift from IDP's traditional invoice processing use case

For nearly 30 years, the best-known and most widely practiced use case for IDP has been invoice processing (source: Deep Analysis). The invoice is one of the most used document types for business; everyone sends and/or receives them, and everyone hates to do the manual data entry from an invoice.

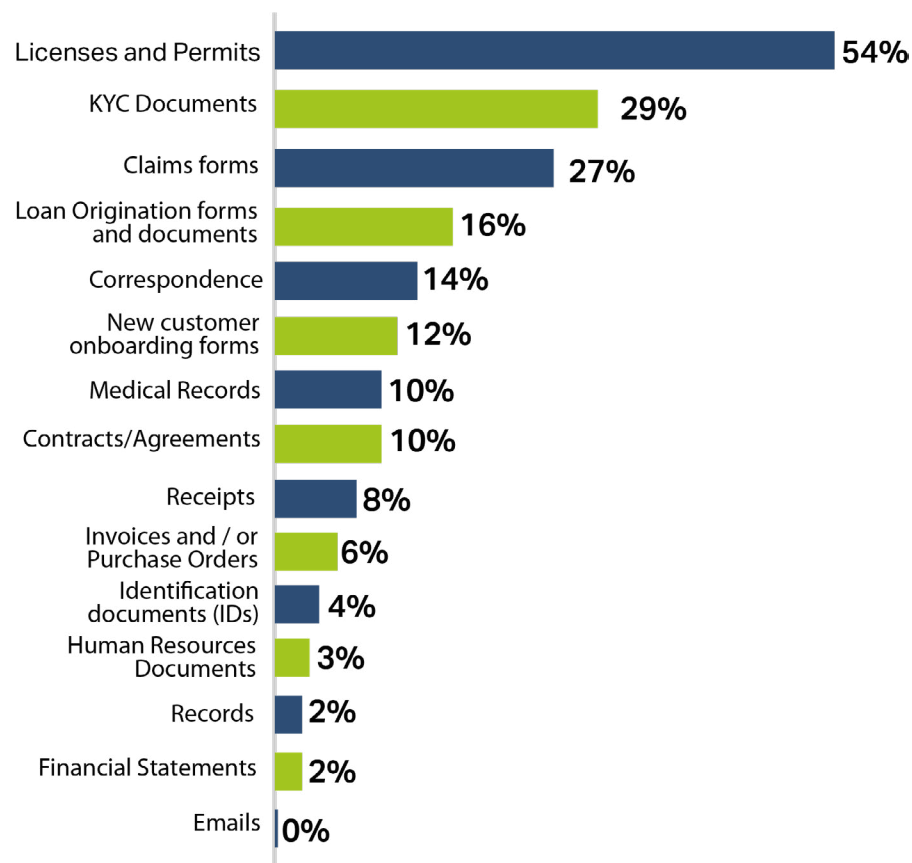
Another widely used document type is the financial statement, long a staple of IDP projects. Financial statements come in many varieties: banking, mortgage, credit cards, business accounts, investments, utilities and more.

There were two surprising results in the survey findings:

- Human resource files** and **contracts/agreements** have become just as popular as invoices and financial statements. AI has fuelled the rise of the two former categories, which both include long-form unstructured documents that were previously very difficult to process with machine learning or templates alone. The rise in HR documents could also be influenced by the trend of AI enabling user-facing workflows.
- Over the next two years, the processing of other document types such as **licenses and permits**, **Know Your Customer (KYC)** onboarding docs, and **claims forms** will grow much faster than invoices and financial statements. We see this as more proof that IDP will continue to expand beyond its traditional back-office functions into front-office, customer-facing operations.

The next chart shows the percentage of the increase for processing a specific document type two years in the future. It is an indicator of which documents are trending. It is important to note that, in context, this was not a question about the number of documents that will be processed.

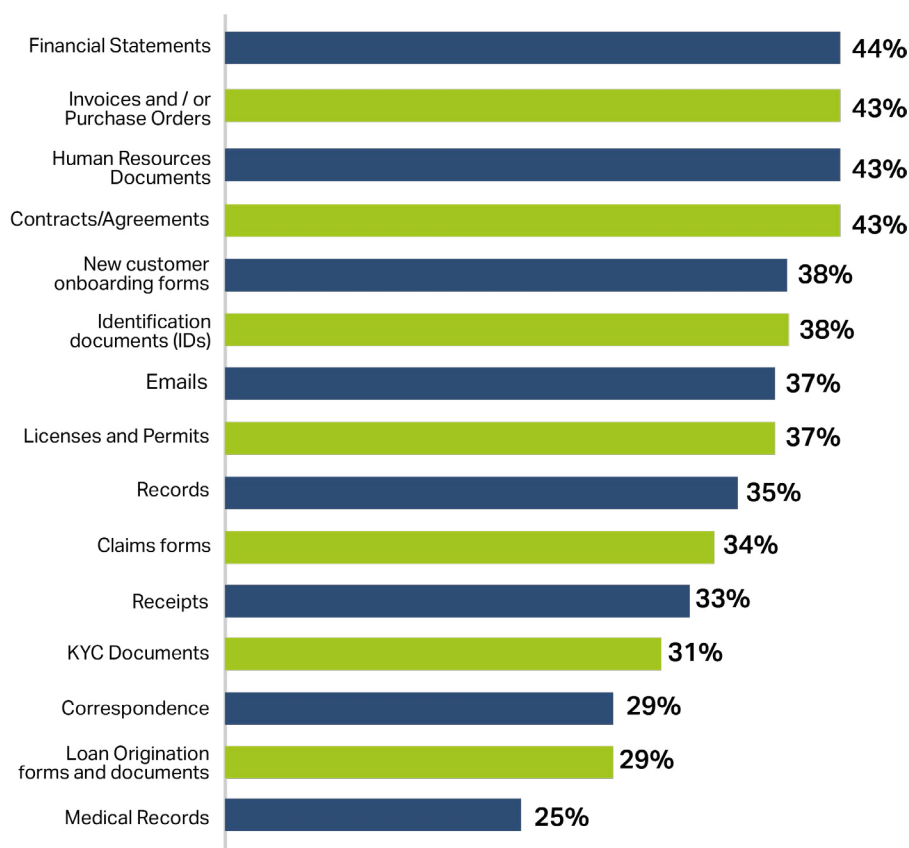
Two-Year Growth Projections for Document Types Processed by IDP



This could indicate where the next areas of growth will come from. Respondents expect a very large increase in the processing of licenses and permits, followed by KYC documents and claims forms.

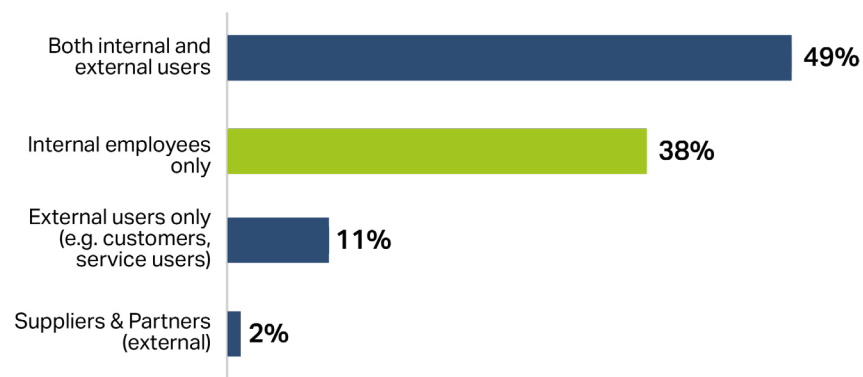
However, the traditional leaders - invoices and financial statements - are still expected to make up the largest document types with modest growth from today. The next chart shows each document type by the percentage of expected use in two years.

What document types do you plan to process with IDP in the next 2 years?



Another data point supporting this seismic shift to front office applications was the finding that **62% of IDP systems now involve external users.**

Who are, or will be, the primary users of the IDP system?

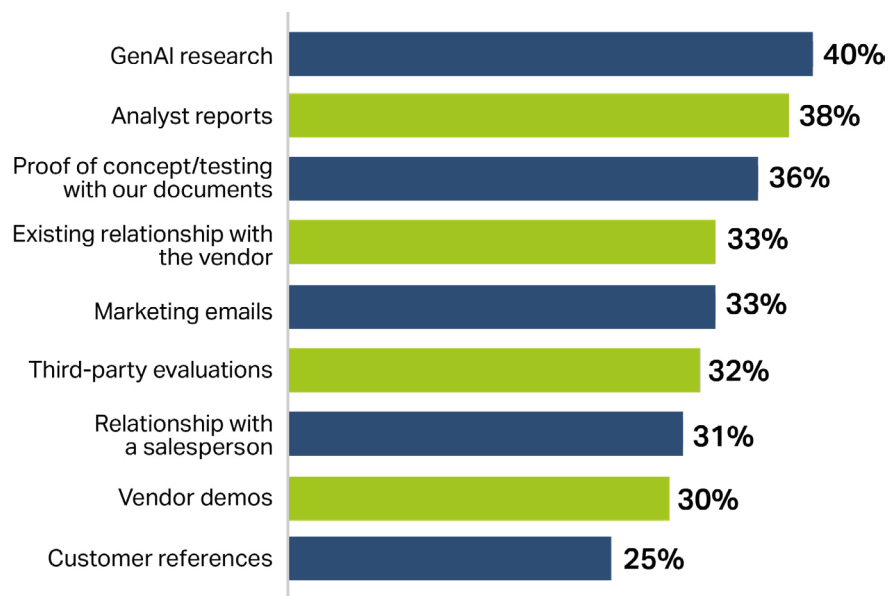


Historically, IDP users were for the most part internal, working in back-office operations or IT and processing batches of documents. The recent introduction of DocAI tools from the hyperscalers — and many new cloud APIs from IDP vendors — have enabled low-cost, secure and efficient asynchronous processing of documents. This has made it much easier for external users to participate in document workflows for use cases such as invoicing, customer service, claims management, or new customer onboarding.

5. GenAI research is reshaping how customers find a product

GenAI research is now the top method for finding an IDP solution – at least for USA companies.

What most influences your choice of new IDP products?



This is a radical change that has occurred in a very short time, driven by everyone having access to a GenAI copilot or search assistant. As the buying process shifts more and more to GenAI, buyers are warned not to rely solely on a GenAI assistant to find the best solution fit. After all, they come with labels warning us about the potential for unreliable data output and hallucinations

which can produce entirely fictitious data. Buyers are encouraged to add proven research methods such as industry analyst reports, discussions with an incumbent vendor, customer references, and third-party evaluation websites.

We also observed a significant variance between USA and DACH companies :

- **USA companies** ranked GenAI research first, followed by industry analyst reports.
- **DACH companies** ranked proof of concept first, followed by the relationship with a salesperson (which USA ranked dead last).

DACH refers to the German-speaking region of Europe, comprising Germany (Deutschland), Austria, and Switzerland.

(See Appendix A for more analysis of regional differences.)

Other Findings about Product Selection

Buyers also gave high ratings to other selection criteria such as proof-of-concept (PoC) testing with their own documents and domain-specific use case experience. Buyers will always value proof over hype and are more interested in products and vendors who show a keen understanding of their industry-specific workflows and documents.

6. Paper refuses to die

Paper is far from dead. We asked about the document sources for current processing.

61% of IDP processes still include paper documents; a surprising number for 2025.

What are the document sources?

Paper that is scanned	61%
Native digital documents (PDF, Microsoft Office, Google Docs, etc.)	73%
Faxes	37%
Digital Forms and attachments	79%
Photos	42%

Even more startling, 48% expect their paper volumes will *increase* over the next 12 months.

Over the NEXT 12 months, how do you expect the volume of paper-based documents to change?

Increase	48%
Decrease	35%
About the same	17%
In 12 months all paper will be eliminated from the process	1%

Only 1% of respondents think their processes will be 100% paper-free by 2026.

We also observed a large regional variance on the future of paper. The DACH companies expect paper to decrease by 50% over the next 12 months, compared to only 30% of USA companies. (See Appendix A for more analysis of regional differences.) There was also a noticeable difference in paper use between industries. Governments and Credit Unions are the most paper-bound, while Manufacturing and Financial Services ranked lowest. (See Appendix B for more analysis of industry differences.)

Hard-copy (or paper) documents are the costliest, most error-prone, and time-consuming components of a business process. This is down to the human work required to handle a paper document. Accordingly, organizations and governments have worked for nearly 40 years to digitize content and eliminate the paper across many facets of our lives. This is all part of the big “digital transformation” movement. Key digital transformation innovations along the way have included the document scanner, mobile phone cameras, and IDP software to “read” digital documents. Much has been accomplished.

Then why is paper still a very large part of AI-driven document processing and so hard to eliminate? It is not the objective of this study to dive deep into the root causes. We suggest the main takeaway should be this: digitizing and processing paperwork is still an essential and critical function for most IDP systems and will continue to be into the near future.

In another shocking but related finding, *faxes are still used in 37% of IDP processes today*. This result was the same across all regions, putting paid to the oft-repeated myth that the USA healthcare system is the only large-scale user of faxed documents. The government and healthcare insurance are the top users of fax.



Trends and Themes

In addition to the prior analysis, trends and themes emerged in the survey data that are highlighted in this section.

1. Change management and process redesign rising

What internal capabilities do you feel are lacking for a successful IDP implementation?

Technical skills	54%
Process redesign expertise	53%
Change management resources	48%
Executive sponsorship	40%
Budget	41%

Technical skills ranked first. This could be related to the recent deluge of new AI and agentic tools coming into the enterprise, requiring even experienced developers and business analysts to train and upskill. It could also be a reaction to the older IDP products that did not have no code or low code options, and required programming skills.

The big surprise here was the high ranking of process management skills. Companies that lack process redesign expertise and change management resources may miss the opportunities for true digital transformation of their operations, settling instead for the mere “digitization” of existing paper-based processes designed in the 1970s.

“**Takeaway:**

Implementing an IDP solution is not simply an upgrade from the old document capture or OCR products. IDP is part of the larger drive for more process automation and the skill sets must extend far beyond those needed for document processing and data extraction.

”



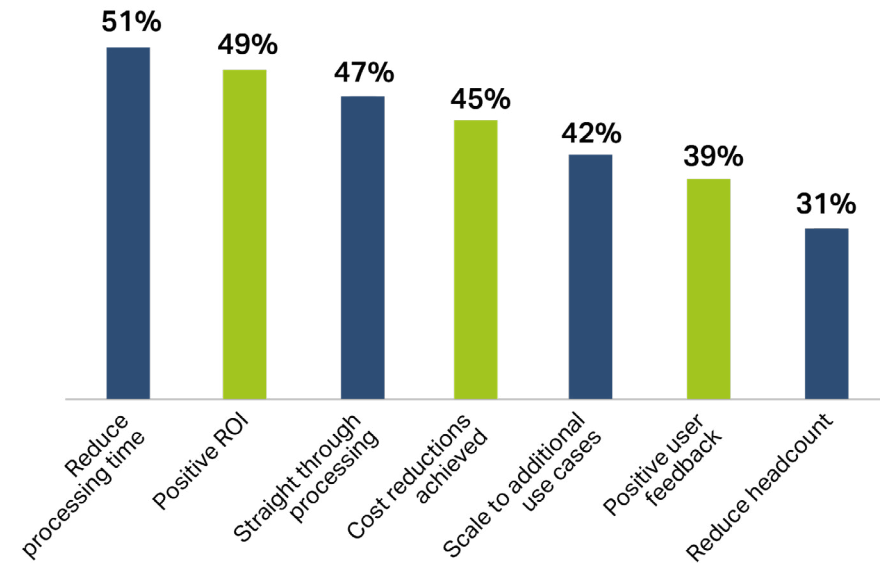
2. IDP won't replace all humans with AI

We asked participants to rank *What do you believe would make your IDP implementation successful?* Here is the list of choices we gave them:

- cost reductions achieved
- positive ROI
- positive user feedback
- reduce headcount
- reduce processing time
- scale to additional use cases
- straight through processing

The lowest ranking was given to Reduce Headcount, with only 30% of respondents selecting it.

What do you believe would make your IDP implementation successful?



“

Takeaway:

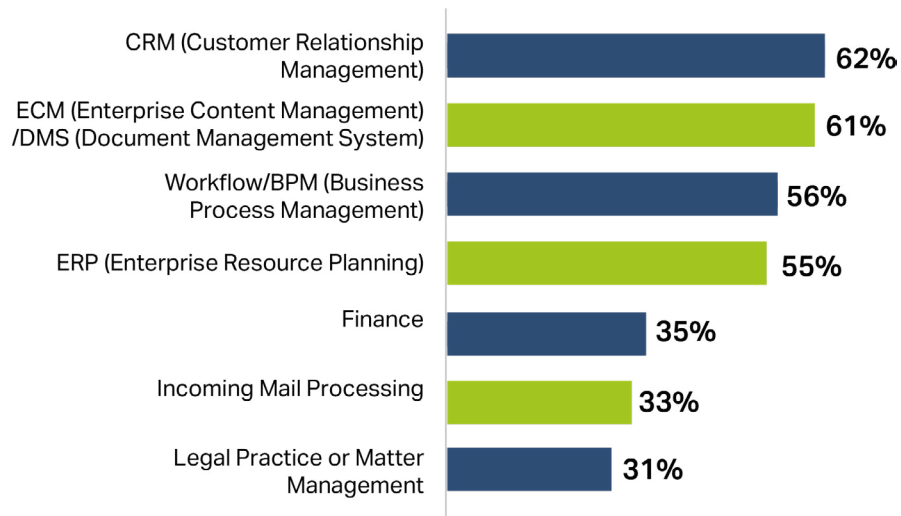
IDP AI is not going to replace humans. The preponderance of use cases and projects involve human-in-the-loop. Most project leaders are more concerned about speed and return on investment.

”

3. CRM passes ECM for document processing

We asked, *What business applications do you use to store, process or manage documents?*

What business applications do you use to store, process or manage documents?



“Takeaway:

CRM systems grabbed the top spot just ahead of traditional leader ECM/DMS. Customer relationships include a wide variety of documents to track and manage the lifecycle. Salesforce, the leader in the space, has recently broadened its product support for unstructured data management and IDP (within the Mulesoft division). We also observed a regional variance in the findings: USA companies were more likely to store documents in a CRM or ERP system, while DACH companies preferred ECM/DM systems.

”



4. Companies are not ready for “performance” pricing

Vendors have mooted new pricing models based on consumption or outcomes, hoping to replace traditional licensing models.

What is your preferred licensing model for IDP software?

Annual subscription based on document volume	31%
Perpetual license + annual maintenance	30%
Annual subscription per user/seat	28%
Price per document processed (pay as you go)	9%
Outcome based pricing (pay for ROI achieved)	3%

The survey results show that only a small percentage (11.5%) prefer these new models. 88.5% prefer the three traditional IDP pricing models.

“ **Takeaway:**

While there’s been a lot of talk about shifts to outcome and consumption pricing, the vast majority of companies still prefer the predictability and stability of fixed pricing models. No one likes the budget shock when you get the “consumption” bill from a hyperscaler. And how does one budget for outcome-based pricing?

”



Conclusions and Recommendations

The *Market Momentum Index: Intelligent Document Processing (IDP) Survey 2025* reveals a transformative phase in the IDP market, driven by rapid AI adoption, shifting use cases, and evolving buyer behaviors. The findings underscore both the immense opportunities and significant challenges facing enterprises as they navigate this dynamic landscape. Below is a synthesis of key insights and strategic implications:

1. AI-Driven Disruption and Market Growth

The survey highlights that **65% of enterprises are actively considering or implementing new IDP projects**, with **66% of these projects aimed at replacing legacy systems**. This unprecedented vendor turnover signals a market ripe for innovation, fueled by GenAI and large language models (LLMs). Startups and scale-ups are capitalizing on this momentum, while incumbents struggle with technical debt and slower adaptation. For vendors, this underscores the urgency of integrating GenAI capabilities—such as zero-shot learning and natural language interfaces—to remain competitive.

2. Expansion Beyond Traditional Use Cases

IDP is no longer confined to back-office functions like invoice processing. **Front-office applications—such as HR files, contracts, licenses/permits, and KYC onboarding—are now dominant**, reflecting AI's ability to handle complex, unstructured documents. The rise of **external user involvement (62%)** further confirms this shift, enabled by cloud-based DocAI tools. Enterprises must reassess their IDP strategies to align with these broader, customer-facing workflows.

3. Data Security and Integration Challenges

Data security and privacy emerged as the top concern, reflecting heightened scrutiny over AI's use of sensitive information. Enterprises must prioritize solutions with robust compliance frameworks, including private cloud or on-premises options. Meanwhile, **integration hurdles** (the second-largest challenge) highlight the need for interoperable standards (e.g., MCP, A2A) and embedded IDP offerings within platforms like Salesforce or Microsoft 365.

4. The Persistent Role of Paper

Despite digital transformation efforts, **61% of IDP processes still involve paper**, and **48% expect paper volumes to grow**. This paradox suggests that digitization alone is insufficient; organizations must address cultural and regulatory barriers (e.g., fax reliance in healthcare) to achieve true paperless workflows.

5. Buyer Behavior and Vendor Strategies

GenAI-powered research is now the #1 method for selecting IDP solutions, surpassing traditional references and analyst reports. Vendors must optimize their digital presence for AI-driven search while ensuring transparency to counter “hallucinations” in AI-generated recommendations. Additionally, **proof-of-concept testing and industry-specific expertise** remain critical for buyers, emphasizing the need for vendors to demonstrate tangible value.

6. Organizational Readiness and Skills Gaps

Enterprises face a **shortage of technical and process redesign skills**, hindering IDP's potential. Success metrics focus on **reducing processing time (50%) rather than headcount (30%)**, reinforcing that IDP is a productivity enhancer, not a pure labor replacement. Companies must invest in change management and cross-functional training to maximize ROI.

Strategic Recommendations



For Enterprises:

- Prioritize AI-augmented IDP solutions for high-impact, customer-facing use cases.
- Conduct rigorous vendor evaluations with a focus on data security, integration ease, and GenAI readiness.
- Address paper dependency through process redesign, not just digitization.



For Vendors:

- Accelerate GenAI integration and emphasize interoperability.
- Tailor solutions to industry-specific workflows and provide transparent AI training data policies.
- Develop “lite” versions to tap into the underserved small-to-midsize market.

Final Outlook

The IDP market is at an inflection point, with AI acting as both a catalyst for growth and a disruptor of legacy norms. Enterprises that embrace this shift—while mitigating risks—will gain a competitive edge in efficiency and customer experience. For vendors, agility and innovation will be the keys to capturing market share in this rapidly evolving landscape.

This report sets a foundation for deeper exploration into regional disparities (e.g., USA vs. DACH adoption rates) and the long-term impact of Agentic AI on IDP ecosystems. Future iterations will track these trends to refine strategic guidance for stakeholders.



Appendix A: Key Findings comparing the USA and DACH responses

For the most part, the findings were remarkably consistent across the two regions. However, there were a few questions where the findings showed interesting differences between the USA 75% responses and DACH 25%.

1. Over the NEXT 12 months, how do you expect the volume of paper-based documents to change?

There was a large differential. DACH companies expect a 50% decrease in paper, while USA companies expect only 30%. This was unexpected, as both regions had identical responses to a previous and related question about current paper use: *What are your document sources for IDP?* Paper was at 61% for both regions.

This finding could indicate that DACH companies expect a sudden and significant decrease in paper processing. While the survey did not delve into the reasons, one possible factor could be the EU-wide rollout of e-invoicing regulations which could eliminate paper documents from the invoice processing use case (IDP's largest).

2. What internal capabilities do you feel are lacking for a successful IDP implementation?

There was a significant regional divergence in what internal capabilities need upskilled.

- **USA companies** ranked Tech Skills #1, 20% higher than DACH rankings.
- **DACH companies** ranked Process Redesign #1, 22% higher than USA.

One interpretation is that USA companies are focused more on gaining AI skills, while DACH companies are more concerned about the process.



3. Which best describes your organization's stage of Intelligent Document Processing (IDP) adoption?

One of the choices given was *Expanding current implementation*. Only 12% of USA companies are expanding their current system, compared to 35% of DACH. This finding could indicate that USA IDP users are moving faster into new use cases compared to their DACH counterparts.

4. What IDP product(s) do you use?

The use of Microsoft and AWS document AI was nearly the same in both regions. This finding runs counter to the perception that EU companies are less willing to trust their data to American hyperscalers.

5. What business applications do you use to store, process or manage documents?

USA companies were more likely to store documents in a CRM or ERP system, while DACH companies prefer the traditional ECM/DM systems.

- **CRM – USA 64%, DACH 55%**
- **ERP – USA 60%, DACH 44%**
- **ECM/DM – DACH 66%, USA 60%**



6. What factors most influence your choice of an IDP product?

USA companies ranked GenAI research first, followed by industry analyst reports. DACH companies ranked Proof of concept with their own docs first, followed by the relationship with a salesperson (which USA ranked dead last).

One interpretation is that DACH companies place a higher value on actual tests and personal relationships, while USA companies prefer to conduct their product research at arms-length.

7. Will the new IDP project replace an existing IDP application?

68% of USA companies said yes, compared to just 59% of DACH. The finding could indicate that USA companies are more likely to change partners in the middle of the dance.



Appendix B: Key Findings by Industry

The following industries are represented in the survey findings.

1. Financial Services
2. Manufacturing
3. Energy & Utilities
4. Healthcare Insurance
5. State or Federal Government
6. Credit Union

For most questions, the findings were similar or close across each industry. However, there were several questions where the findings were notably different.

1. Which of the following most closely represents the department/function you work in?

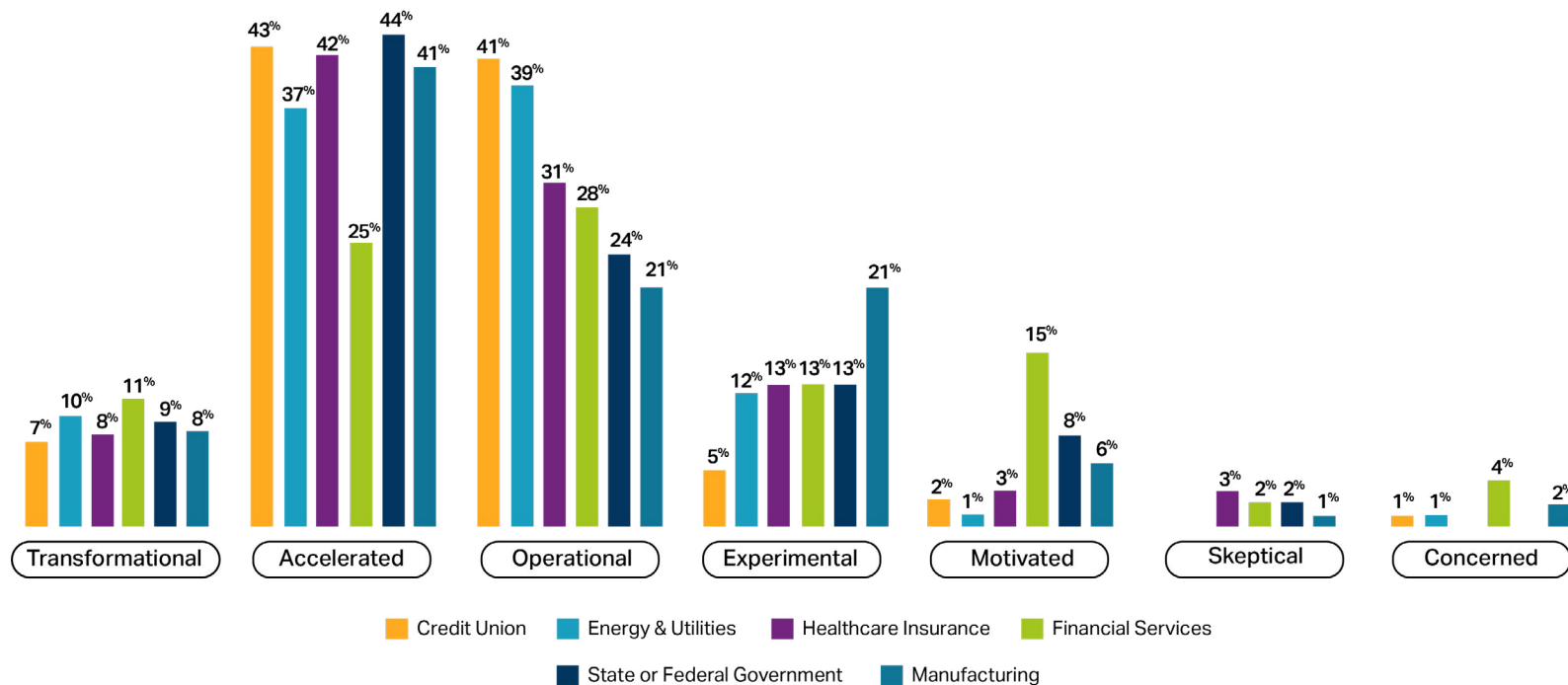
IT scored a 70% average, and five of the six industries were grouped near that. Financial Service was the notable outlier with IT at only 37% — tied with the Finance department.



2. Regarding the use of AI technology to automate document processes, at what stage would you place your organization?

The following chart illustrates where companies in each industry described their stage of AI adoption for document processing.

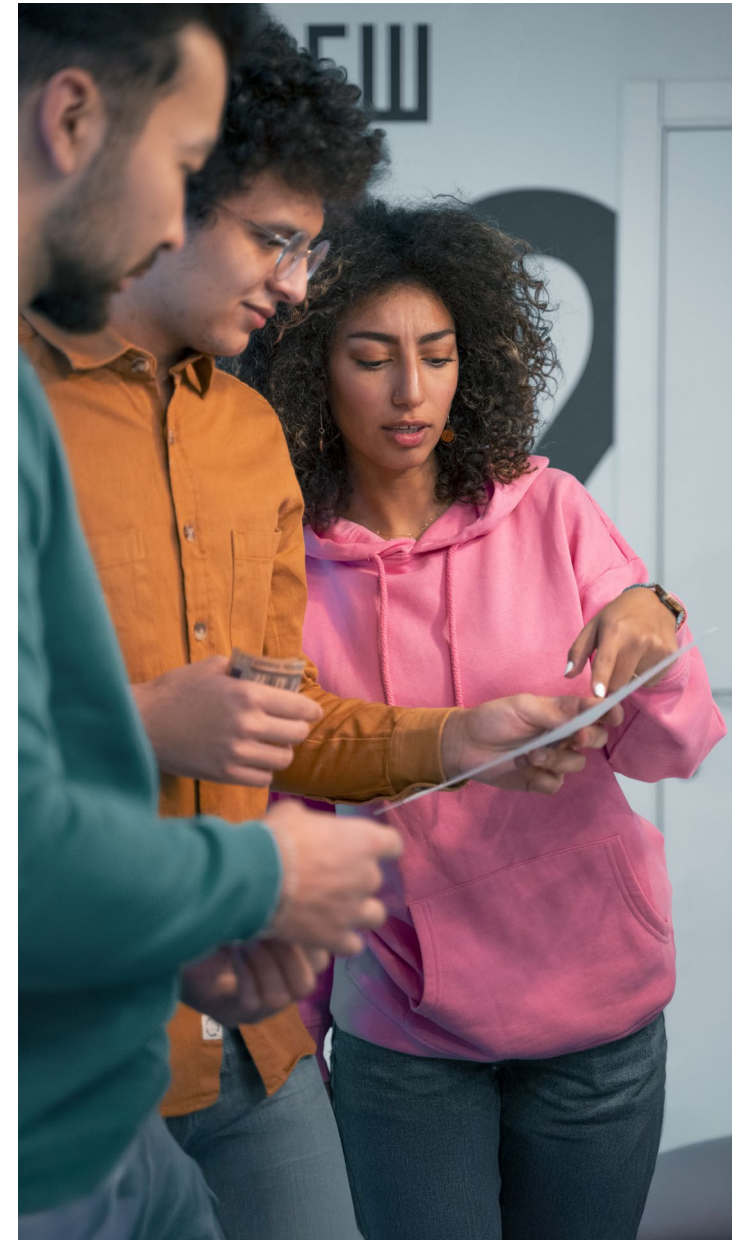
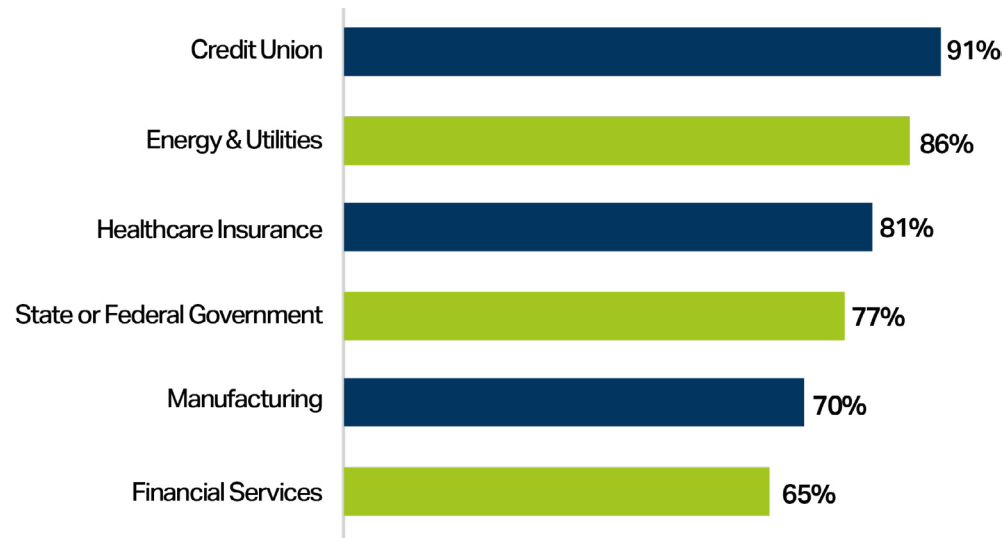
Regarding the use of AI technology to automate document processes, at what stage would you place your organization?



Most of the participants (78% in all) rated themselves as Operational (We have begun to adopt AI into some of our day-to-day functions), Accelerated (Adopting AI into many of our day-to-day functions, continuously seeking new use cases), or Transformational (AI is built into the DNA of our business and into almost all our day-to-day functions).

Combining Operational, Accelerated, and Transformational together gives us a total AI Readiness score and shows which industries are the most evolved at using AI for document processing.

AI Readiness total score (operational + accelerated + transformational)



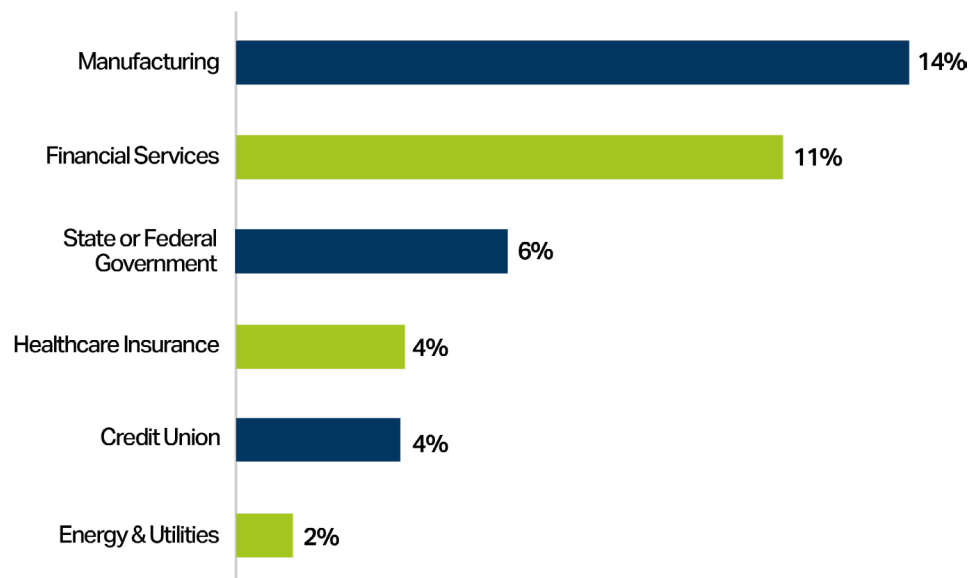
3. Which best describes your organization's stage of Intelligent Document Processing adoption?

Participants were asked to choose one from the following list:

- Not considering
- Researching options
- Pilot/testing phase
- Implementing now
- Already implemented
- Expanding current implementation

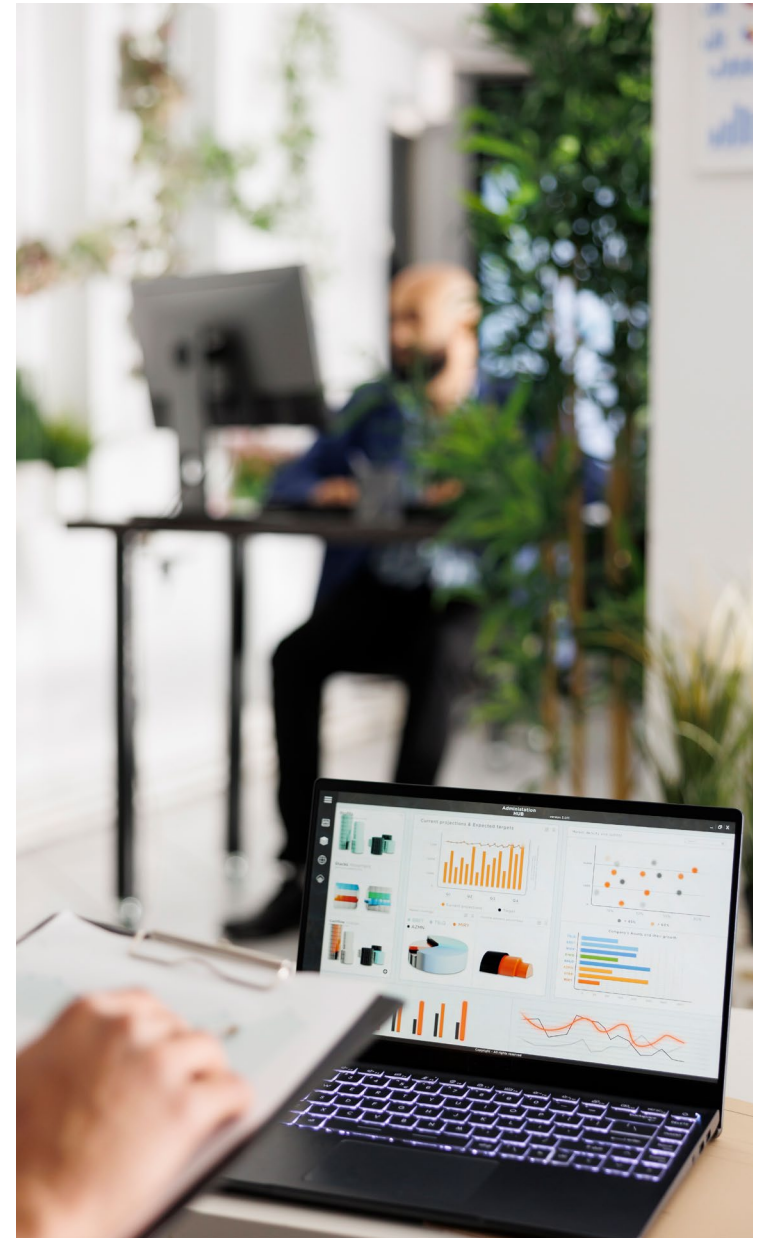
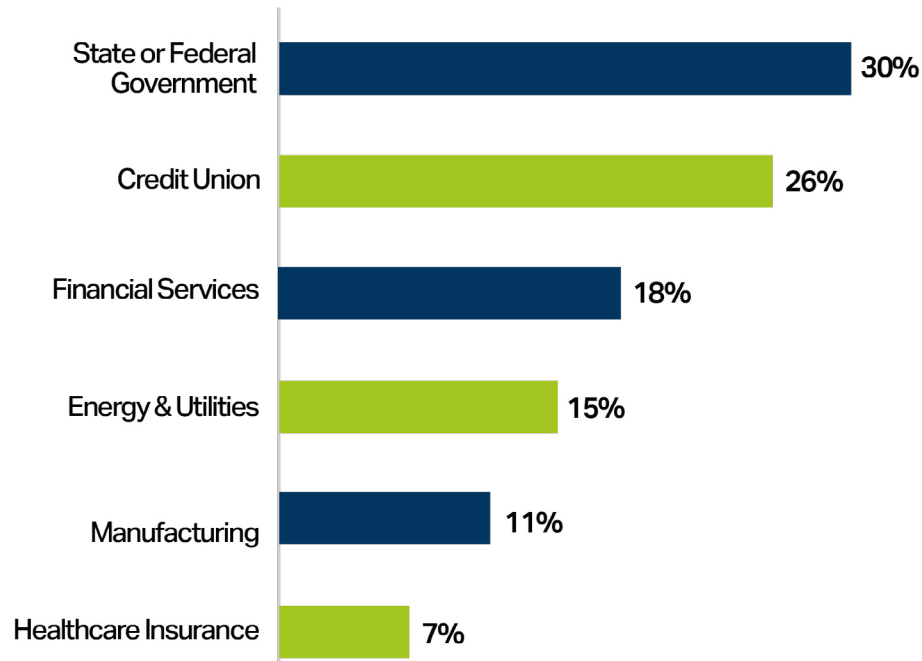
Significant differences occurred in two of the choices. The first was Researching options. Manufacturing was top with 14% of companies in the research phase, with FinServ at 11%. No other industry was in double digits.

Researching options



The second outlier was Expanding our current implementation. 30% of Government respondents will expand their existing IDP implementation, followed by Credit Unions at 26%. Only 7% of Healthcare Insurance companies are doing this.

Expanding current implementation



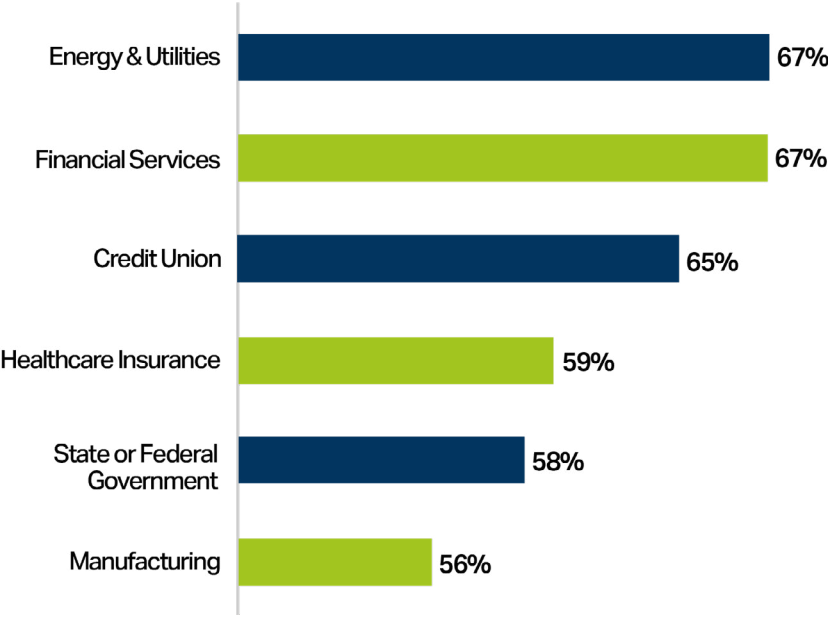
4. What percentage of your document processing is currently automated?

What would your desired future automation look like in 2 years?

Use cases and document difficulties vary from industry to industry. AI technology is not yet at a level where it is feasible to automate 100% of the documents in most IDP use cases. Companies are using a combination of LLMs, machine learning models, and even old-fashioned regular expression scripts to chip away at the so-called “final mile” of automation.

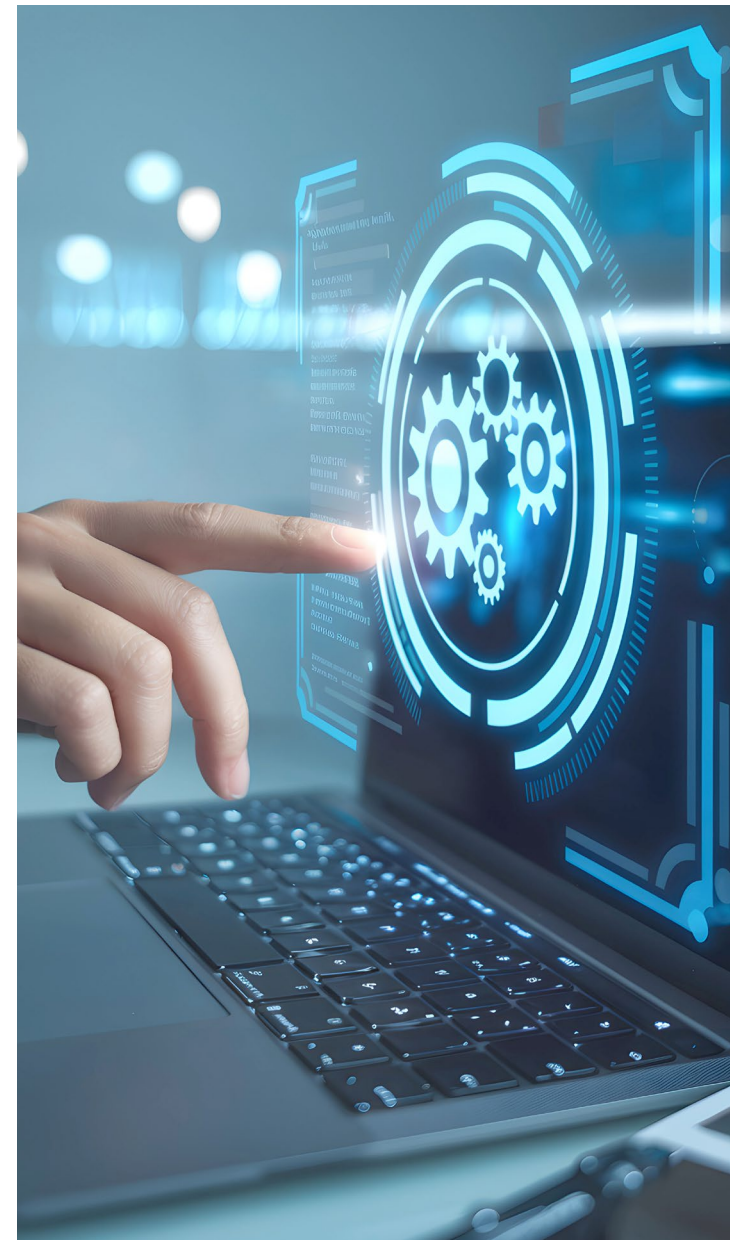
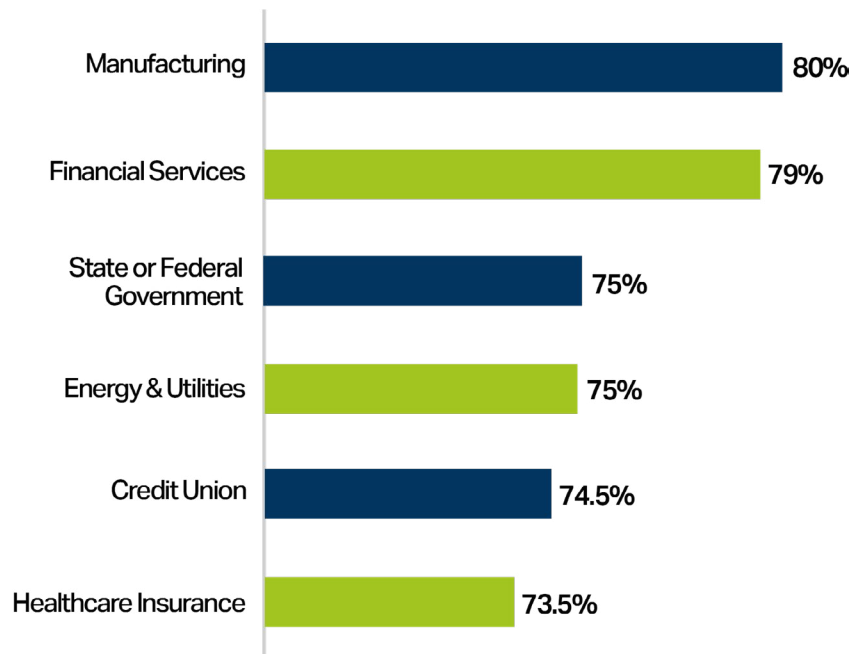
The average automation percentage today across all respondents is 63% of documents. Industries furthest along are Energy & Utilities and FinServ, tied at 67%.

What percentage of your document processing is currently automated?



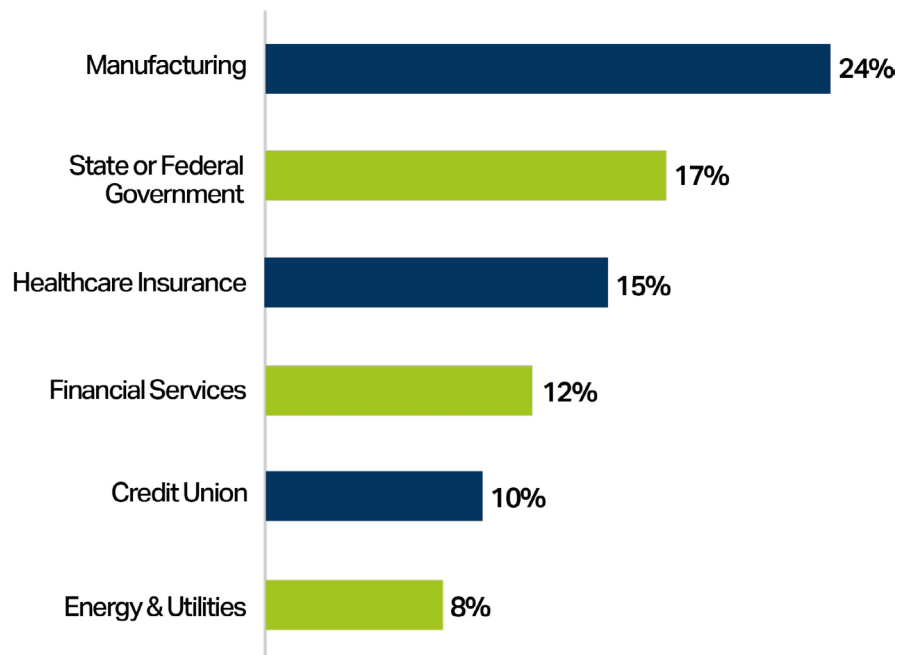
When asked to project their automation goals into the future, the findings were conclusive that every industry hopes to process more documents with AI.

What would your desired future automation look like in 2 years?



Another way to gauge automation plans is to look at the increase between today and in two years' time. Manufacturing has the most ambitious increase, followed closely by State or Fed Govt.

Increase in automation in 2 years time



While those increases may seem small or insignificant to some readers, even small increases in automation can yield large improvements in a use case. Let's take the example of 100,000 invoices a month processed by a manufacturing company. At 56% automation, there are still 44,000 documents to manually process. Taking it to 80% means an additional 24,000 docs are automated. That is a 43% productivity improvement.



5. What are your top 3 reasons for adopting IDP?

Participants were given a list of reasons and asked to rank their top three.

- Reduce processing costs
- Improve processing speed
- Reduce errors
- Improve compliance
- Free up staff for higher-value work
- Enable digital transformation
- Competitive pressure
- Support business growth/scalability

Here is how each industry ranked their reasons.

Industry	#1	#2	#3
Healthcare Insurance	Free up staff for higher-value work	Reduce errors	Improve processing speed
Energy & Utilities	Reduce processing costs	Support business growth/scalability	Reduce errors
State/Federal Govt	Reduce processing costs	Support business growth/scalability	Free up staff for higher-value work
Financial Services	Reduce processing costs	Improve compliance	Improve processing speed
Manufacturing	Competitive pressure	Reduce errors	Reduce processing costs
Credit Unions	Reduce processing costs	Competitive pressure	Improve compliance



6. What do you believe would make your IDP implementation successful?

It is interesting to compare the previous table to this question asking about how the companies would measure the success of an implementation. Each industry chose its own top metric of success for IDP.

- Healthcare Insurance - Reducing processing time
- Energy & Utilities - Achieving straight-through processing
- State or Federal Government – A positive ROI
- FinServ - Ability to scale to additional use cases
- Manufacturing - Achieving cost reductions
- Credit Union - Positive user feedback

7. How many documents are or will be processed monthly through your IDP system?

The answers varied widely from industry to industry. Where are the highest document volumes found?

Industries who are processing over 100,000 documents a month:

1. Energy & Utilities (38% of companies)
2. State or Federal Government (30%)
3. Healthcare Insurance (25%)
4. FinServ (22%)
5. Manufacturing (13%)
6. Credit Unions (11%)

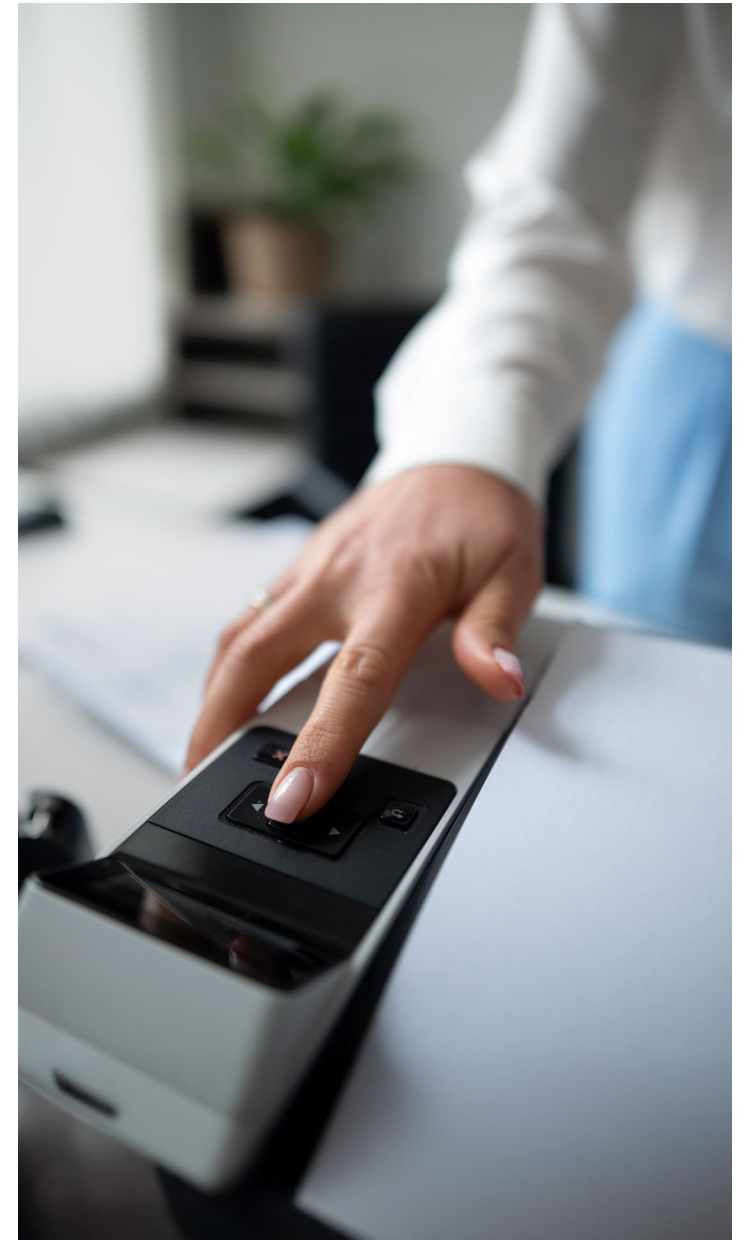
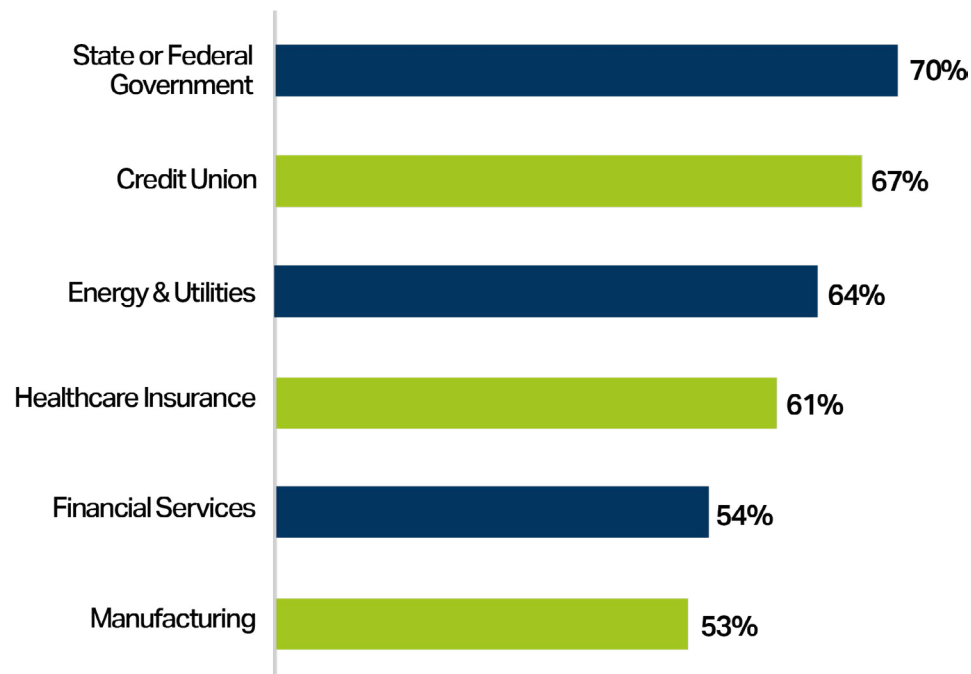


8. What are the document sources?

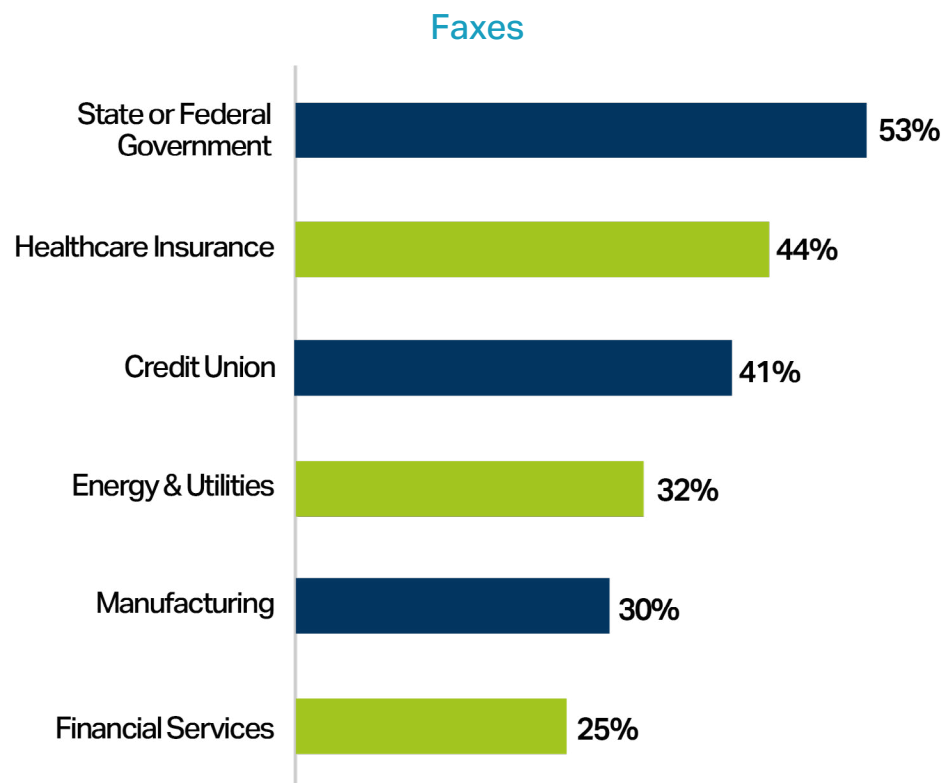
Digital documents (forms, PDFs, attachments, docs, spreadsheets etc) comprise the largest source of documents processed by IDP today. The findings were relatively similar across industries. Of special interest was the continuing high use of paper and faxed documents.

The median finding for paper as a source was 61%. Some industries are more paper bound than others. State and Federal Government leads the way, while Manufacturing and FinServ are making better progress towards paperless.

Paper that is scanned



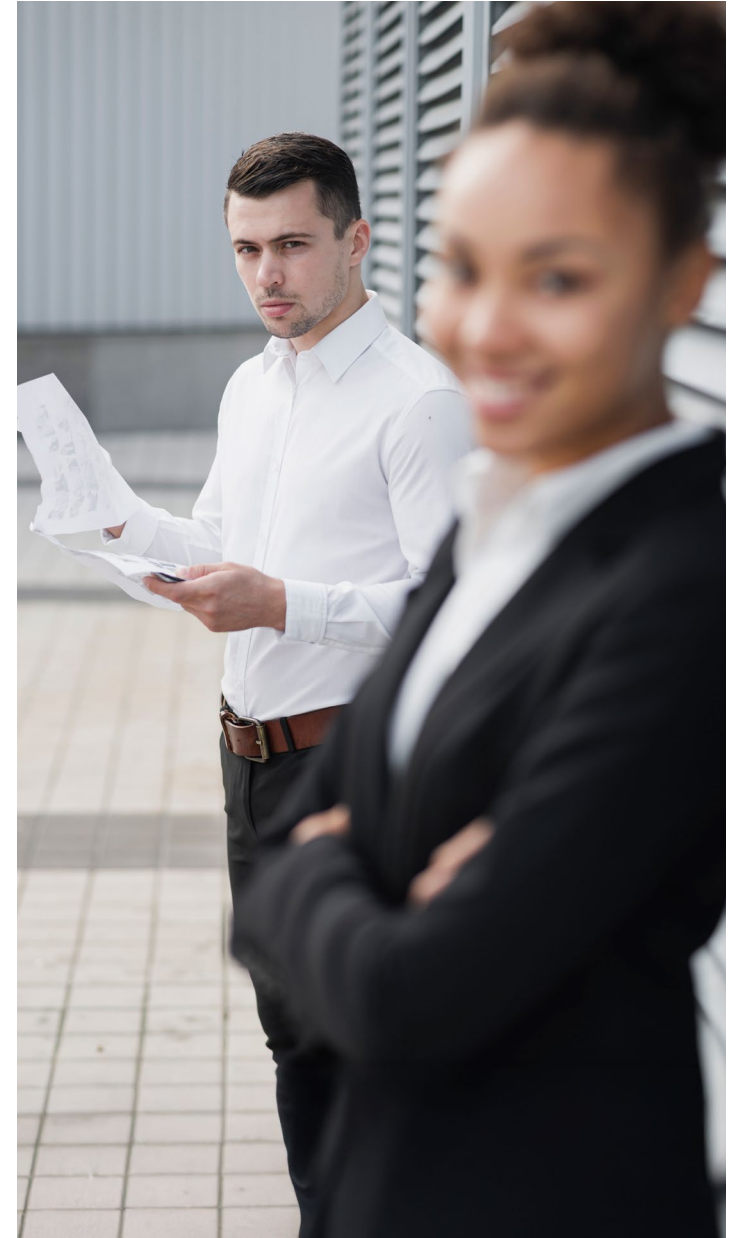
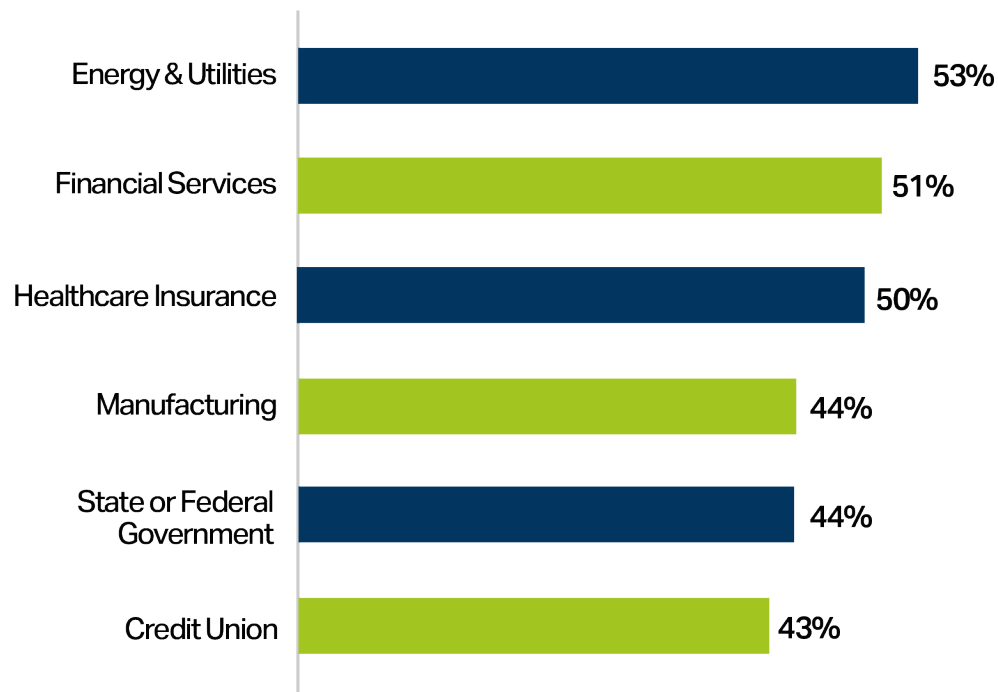
Fax use surprised with a 37% median score. Once again, State and Federal Government leads and by a wide margin: over half of the government still processes fax documents. Healthcare was second, despite efforts to eliminate fax machines across the EU. FinServ had the lowest use of faxes.



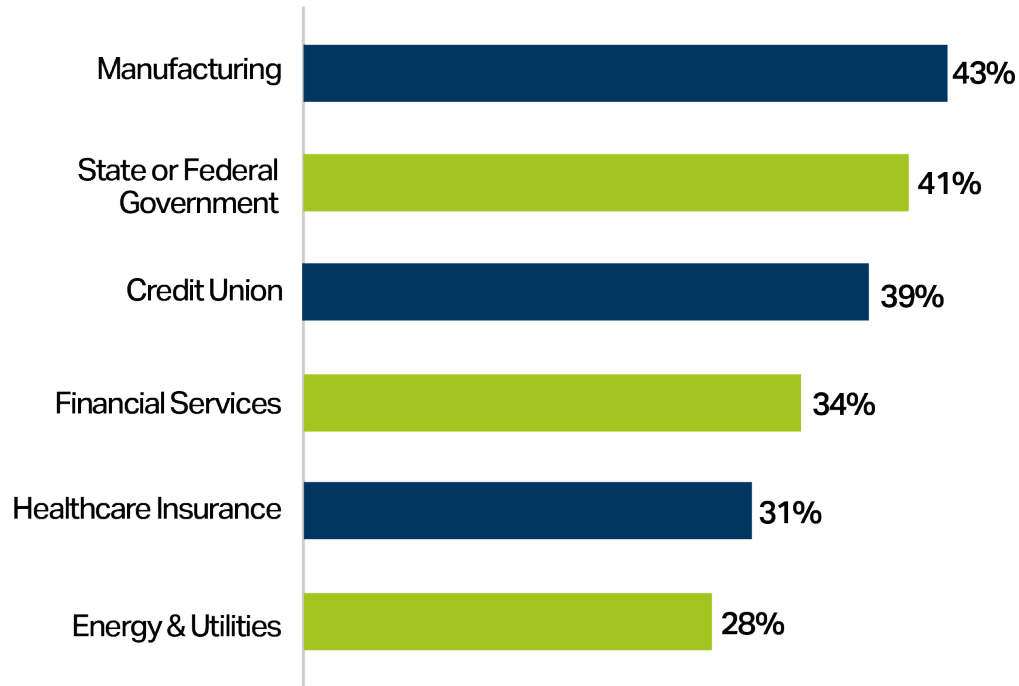
9. Over the NEXT 12 months, how do you expect the volume of paper-based documents to change?

Here we analyzed the relative change of volume by industry, by comparing each industry's rate of increase to decrease. The Energy & Utilities industry is expecting the largest relative increase in paper documents for processing (53% increase vs 28% decrease). Healthcare Insurance is second (50% increase vs 31% decrease), with FinServ at third place (51% vs 34%). The other industries are balanced between increased and decreased volumes.

Paper volumes will increase



Paper volumes will decrease



10. What concerns do you have about implementing AI for document processing?

Participants were given a list of concerns and could select any that applied.

- Data security and privacy
- Cost of implementation
- Integration with existing systems
- Lack of understanding or training
- Data sovereignty



The top concerns varied by industry. Five out of six industries ranked Data security and privacy as the number 1 concern; Energy & Utilities ranked it number 3. Credit Union was the only industry to rank Lack of understanding or training in their top 3.

Industry	#1	#2	#3
Healthcare Insurance	Data security and privacy	Cost of implementation	Integration with existing systems
Energy & Utilities	Cost of implementation (top score)	Potential job displacement (top score)	Data security and privacy
State/Federal Govt	Data security and privacy (top score)	Integration with existing systems	Cost of implementation
Financial Services	Data security and privacy	Integration with existing systems	Cost of implementation
Manufacturing	Data security and privacy	Integration with existing systems (top score)	Cost of implementation
Credit Unions	Data security and privacy	Lack of understanding or training (top score)	Potential job displacement



Appendix C: Use Case Trends

In the survey, we asked *What is the purpose of your new IDP project?* Respondents were given three choices:

1. To upgrade existing use cases,
2. To automate new use cases,
3. Both 1 and 2.

If a respondent chose number 2 or number 3, they were then asked to provide a brief description of their use case. 174 companies did so, and we grouped their responses into the following categories.

1. Customer Experience & External Engagement

- **Automated Customer Support:** Using AI to classify inquiries and provide instant responses.
- **Personalized Recommendations:** Extracting customer data for predictive analysis and improved service experience.
- **Customer Retention Strategies:** Using IDP to analyze historical interactions and prevent churn.

2. Compliance & Risk Management

- **Regulatory Compliance:** Automating audits, compliance checks, and reporting to meet industry standards.
- **Fraud Detection:** Leveraging AI to identify inconsistencies in claims and financial transactions.
- **Security & Authentication:** Verifying ID photos, supporting real-name authentication, and preventing unauthorized access.



3. AI-Powered Process Automation

- **RPA Enhancements:** Integrating IDP with bots to process semi-structured invoices, contracts, and emails.
- **AI-Based Classification:** Using AI to categorize customer emails, internal records, and business documents for automated routing.
- **Automated Decision-Making:** IDP-powered analytics to support strategic decisions from market research reports and customer feedback.

4. Robotics, Manufacturing & Engineering

- **Intelligent Factories:** IoT-based data extraction to optimize production efficiency and predict maintenance needs.
- **Process Automation:** Automating compliance and safety protocol checking for new manufacturing lines.
- **Automated Engineering Workflows:** Enhancing efficiency in processing technical documents and operational data.

5. Healthcare & Medical Applications

- **Patient Records Processing:** Rapid extraction of key health data from referral documents.
- **Medical Literature & Research:** Automating analysis of medical reports and regulatory documents for compliance.
- **AI-driven Equipment Needs:** IDP applied to classify and manage medical equipment requirements.



6. Sustainability & ESG Reporting

- **Clean Energy Optimization:** AI-driven power grid management to improve energy efficiency.
- **Sustainable Materials Processing:** Automating ESG reporting and regulatory documentation for environmental initiatives.

7. Document Processing & Workflow Optimization

- **Invoice & Expense Management:** Automating invoice approvals, extracting data from financial records, and managing reimbursements.
- **Contract Review & Lifecycle Management:** Streamlining negotiations, validation, and tracking contract terms.
- **Loan & Application Processing:** Accelerating mortgage applications, loan approvals, and customer onboarding with automated document handling.

8. Emerging Use Cases & Experimental Projects

- **Hybrid AI-Driven Automation:** Exploring AI's limits in replacing manual processes without errors.
- **HR & Recruitment Enhancements:** Streamlining onboarding by automating data extraction from resumes and forms.
- **Version Control & Document Archiving:** Supporting legal documentation workflows and corporate governance.





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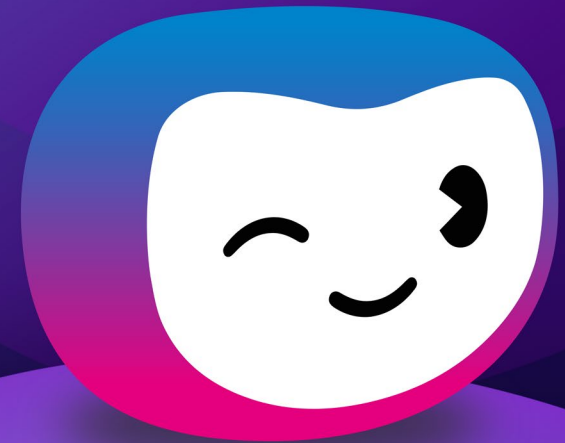
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Doxis delivers solutions for your **most important enterprise use cases**, including:

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About DocuWare IDP

DocuWare's AI powered Intelligent Document Processing (IDP) is designed **to accurately extract and classify** information from even the most complex documents — helping organizations automate processes with confidence. **By focusing on precision over prediction**, DocuWare ensures reliable results that drive smarter workflows across invoices, contracts, HR files, and more.

Advanced OCR and HTR technologies transform unstructured content into actionable data, enabling seamless automation of workflows and accelerating productivity.

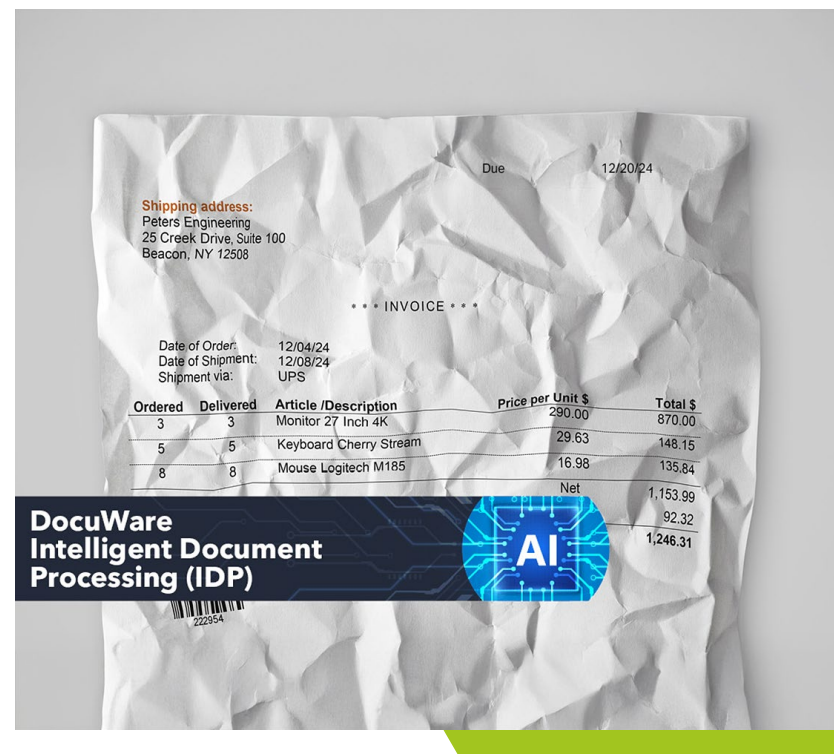
Security is built into every layer of our solution, safeguarding sensitive information while integrating effortlessly with Microsoft 365, ERP, and CRM systems. With pre-trained use cases and customizable AI models, DocuWare adapts to your unique business needs—**reducing configuration time** and scaling operations with ease.

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About Infocap

Infocap is a human-centric automation company and consulting partner specializing in Intelligent Document Processing (IDP) and Agentic AI for complex, document-intensive operations.

We co-innovate with future-facing leaders in organizations across government, financial services, and highly regulated industries, transforming how they operate, not just by digitizing, but by redefining how human and digital workers collaborate. At the heart of our approach is a belief that automation must transform processes to unlock the untapped potential in your human workforce.

Infocap combines deep domain experience with cutting-edge technologies to solve problems where most automation falls short: high volume, high variability, and high stakes. We offer a unique blend of intelligent automation solutions, strategic consulting, and professional services to ensure successful design, implementation, and long-term optimization.

Our capabilities center on intelligent document processing, helping organizations move beyond basic capture to intelligent systems that understand, extract, and act on data from both structured and unstructured sources. From modernizing digital mailrooms to accelerating onboarding, managing service documentation, or improving response times for member or citizen services, we enable organizations to process faster, operate more transparently, and adapt more confidently.

Infocap's solutions include not just expert level implementations of 3rd party platforms like Tungsten Automation and AWS, but our own custom-built Intelligent Document Processing platform. With a built-in document repository and ability to run headless or with a user-friendly UX, the platform is designed, developed, and deployed as an entirely cloud-native, serverless, highly scalable, and high performance IDP platform. It is available as an Enterprise SaaS solution on the AWS Marketplace, or the foundation of a completely custom implementation built to your needs.

What makes Infocap different? Our human-centric approach to automation.

We don't build systems that replace people; we build systems that *partner* with your people. By leveraging Agentic AI, we enable digital assistants that can reason, adapt, and collaborate, serving as real contributors to your team, not just rule-based tools with hardcoded limits that are never quite enough.

Infocap places the human perspective at the center of our approach, ensuring that every automated outcome is observable, explainable, and accountable, instead of an unpredictable black box.



About Infocap

Whether you're dealing with backlogs of work, unpredictable exceptions, or rising service expectations, Infocap helps bridge the gap between your digital ambitions and your operational reality.

Key areas of expertise include:

- **Intelligent Document Processing (IDP)** for paper and digital content
- **Agentic AI** solutions for document understanding and decision support
- **Human-Centric Automation** that maintains transparency and accountability
- **Consulting & Professional Services** for discovery, design, and change management
- **Public sector modernization**, including constituent services and operational transformation
- **Financial services innovation**, including onboarding, servicing, and member engagement

Our leadership team includes CEO Nathaniel Palmer, a leading voice in digital transformation and AI in government and regulated environments. He is a pioneer in automation and digital transformation, serving as Chief Architect to several of the largest and most complex initiatives across government and private industry, totaling over \$3.5 billion in research and development.

With decades of experience leading high-impact initiatives, our team ensures that automation isn't just adopted; it's aligned, scalable, strategic, and continuously tuned to increase efficiencies and decrease costs.

Infocap empowers organizations to achieve results previously considered unattainable, with intelligent automation that creates real-time responsiveness, reduces operational friction, and elevates the human contribution of your team.

To help organizations assess where they stand and what's possible, we offer a free Human-Centric Automation Readiness Assessment. This interactive tool helps identify your organization's top priorities and provides guidance on how to move forward with confidence through intelligent automation through the cutting edge of Agentic AI.

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For more information about Infocap's approach, capabilities, and results, visit infocap.ai.

PYRAMID SOLUTIONS

About Pyramid Solutions

Pyramid Solutions specializes in Business Automation Workflow, ECM, Capture, RPA, RAG, and Cloud technologies that drive growth through best-in-class solutions.

With our unique combination of industry expertise, strategic thinking, and technology leadership, Pyramid Solutions solve business and technology challenges by delivering visionary solutions that produce exceptional results.

Pyramid Solutions expertly uses artificial intelligence to address traditional document capture needs.

Leveraging natural language processing, machine learning, and advanced imaging, we process complex documents and transform the data into new insights for you.

Marty Gulewicz

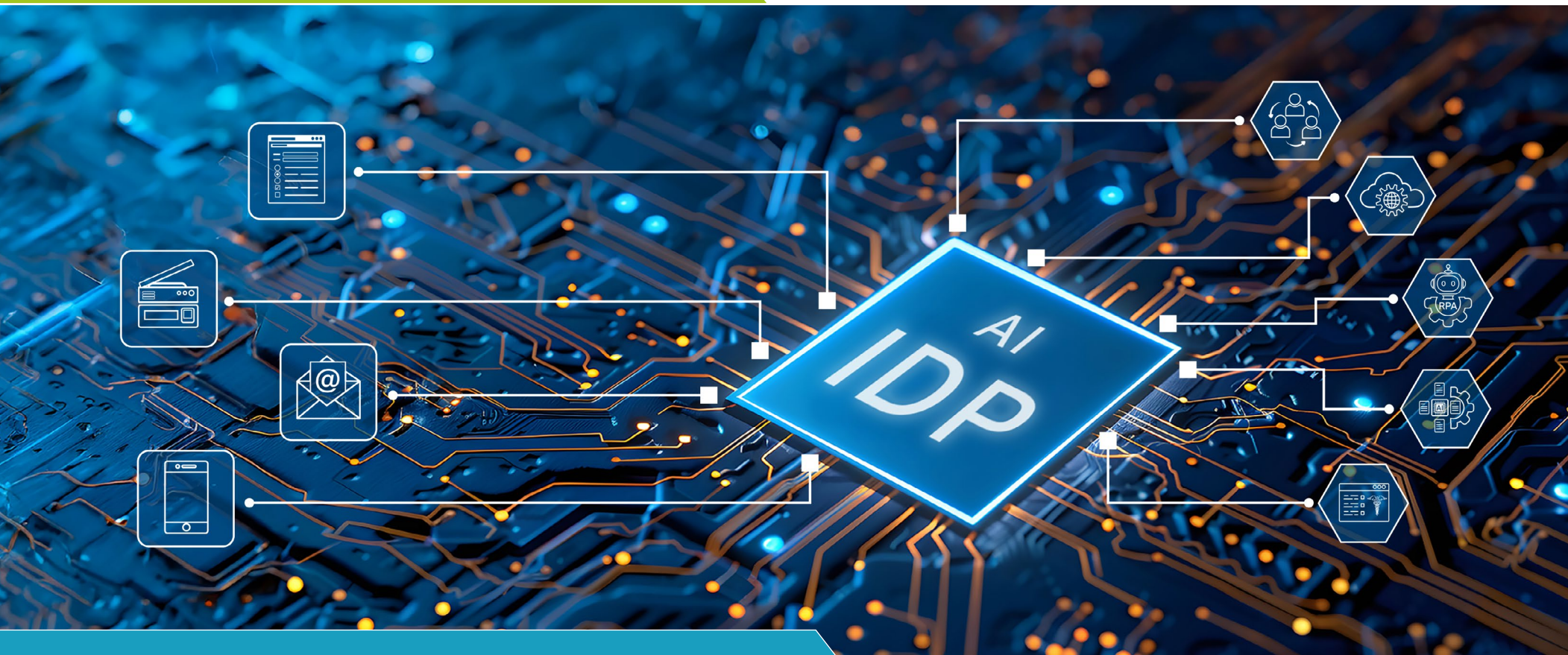
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