

5 Questions to Answer Before You Invest in AI Document Automation



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Everyone's Selling AI. Not Everyone Should Be Buying.

Right now, every document management vendor is talking about AI.

Machine learning. Intelligent capture. Predictive routing.
Automation rates of 90% and higher.

Some of it is real.
Some of it isn't.

After 26 years of implementing document systems - and watching the shift from basic digitization to intelligent automation - one thing is clear:

AI works. But it doesn't work everywhere.

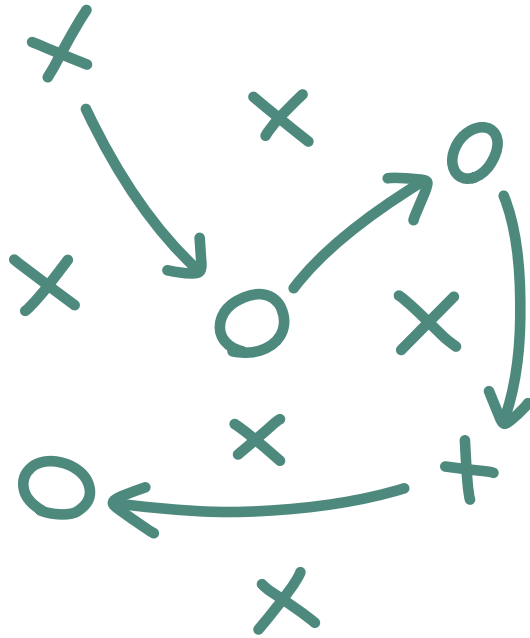
And more importantly, not every organization is ready for it.

This isn't about budget.
It's not about technical sophistication.

It comes down to whether your operation is prepared to support it.

Because the most expensive AI project isn't the one you approve.

It's the one that fails after you deploy it.



Start Here: Define What AI Is Supposed to Do

Before software. Before demos. Before internal discussions.

What exactly are you trying to accomplish with AI?

This is where most organizations lose clarity.

They start with tools instead of outcomes.

They chase automation instead of solving problems.

AI is not a strategy.

It is an enabler.

If the objective isn't clear, the results won't be either.

Understand the Four Levels of Value

AI in document management is not a single capability.
It builds in layers.

Where you start - and how far you go - should be intentional.

1. Recognize and Index Documents

This is the foundation.

Documents are identified, key data is extracted, and everything is indexed consistently.

The value here is control.

- Faster search and retrieval
- Consistent filing
- Reduced manual entry

If this isn't solid, everything else struggles.

2. Enable Business Process Workflows

Once documents are structured, they can move.

Routing, approvals, matching, and workflow automation begin to take shape.

Now the value shifts to efficiency.

- Documents move automatically
- Approvals are trackable
- Bottlenecks become visible

This is where operations start to feel the impact.

3. Automate ERP Transactions

This is where expectations rise - and so do risks.

Data is extracted, validated, and pushed directly into your ERP.

Documents become transactions.

- High-confidence data posts automatically
- Exceptions are isolated
- Cost per document drops

This is also where weak data and poor processes get exposed quickly.

4. Analyze Processing Performance

Most organizations never get here - but this is where long-term value lives.

Once documents are flowing, they generate data.

That data tells you how your business actually operates.

- Processing times
- Exception rates
- Cost per document
- Workflow bottlenecks

At this point, AI is no longer just doing the work.

It's helping you improve the work.

One Objective or Four?

There is a difference between:

"We want to automate invoice entry."

and

"We want to reduce processing cost, accelerate approvals, automate ERP postings, and continuously improve performance."

One is a feature. The other is a roadmap.
Be honest about which one you're pursuing.

Now Answer These 5 Questions

Once your objectives are clear, the next step is simple:

Are you actually ready to support them?

1

Do you have enough volume and repetition?

AI depends on patterns.

No repetition means no learning.

- 50 invoices a month? *Stay manual.*
- 5,000 invoices a month? *Now it matters.*

Ready:

- 500+ documents per type
- Repeat vendors or sources
- Consistent formats

Not Ready:

- Low or inconsistent volume
- One-off documents
- Rare processes

2

Can You Control How Documents Enter the System?

AI doesn't fix messy intake.

If documents arrive from everywhere - in inconsistent formats - you carry that problem forward.

Ready:

- Controlled intake channels
- Acceptable document quality
- Ability to standardize

Not Ready:

- Uncontrolled sources
- Poor scan quality
- No intake discipline

3

Can You Validate the Data?

Extraction is not accuracy.

Without validation, you're just moving errors faster.

Ready:

- Clean master data
- System integration
- Clear sources of truth

Not Ready:

- Inconsistent data
- Siloed systems
- No validation layer

4

Are You Prepared to Handle Exceptions?

AI reduces exceptions. It doesn't eliminate them.

That last 5–15% still matters.

Ready:

- Staff available for review
- Realistic expectations
- Feedback loop in place

Not Ready:

- No review capacity
- Expectation of 100% automation
- “Set it and forget it” mindset

5

Will Your Team Actually Use It?

This is where most projects fail.

Not because of technology.
Because of behavior.

Ready:

- Users involved early
- Clear rollout plan
- Leadership aligned

Not Ready:

- Forced adoption
- No change management
- History of failed rollouts

Score Yourself

For each question, give yourself an honest assessment:

Area			
1. Value & repetition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Intake consistency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Validation systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Exception handling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. User adoption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Interpreting Your Score:

- 5 Yes answers: Move forward
- 3-4 Yes answers: Close, fix gaps first
- 1-2 Yes answers: Build the foundation
- 0 Yes answers: Not the right time

If You're Not Ready

That's not failure. It's clarity.

Focus on what matters:

- Clean up data
- Standardize intake
- Improve workflows
- Align your team

These steps create value now - and position you for AI later.

If You Are Ready

Then this isn't just a software decision.

It's an operational commitment.

AI document automation is not something you install and walk away from.

It's something you build over time.

Where AI Projects Actually Break Down

Most failures aren't technical.

They show up in the environment around the technology.

Change Management

People don't automatically change how they work.

Data Quality

Inconsistent data produces inconsistent results.

Cross-References

Mappings between vendors, customers, and items must be maintained.

Document Quality

Bad inputs increase errors and exceptions.

ERP Limitations

Your ERP ultimately determines what can be automated.

Real-World Complexity

Special pricing, backorders, and exceptions are normal—not edge cases.

Bringing It Together

These issues compound:

- Weak data increases exceptions
- Poor quality reduces confidence
- ERP constraints slow everything down
- Lack of adoption undermines the system

That's why this isn't a technology decision.

It's an operational readiness decision.

Final Thought

AI has earned its place in document management.

But it is not a shortcut.

It amplifies what's already there - good or bad.

So the real question isn't:

"Should we invest in AI?"

It's:

"Are we prepared to make it work?"

Invitation

If you're evaluating AI document automation - or questioning whether you should be - this is the right time to step back.

After years working with founders as a CPA and building MaxRecall into an AI-enabled platform for wholesale distribution, one thing is consistent:

Success depends far more on preparation than technology.

A focused 30-minute discussion can help you:

- Assess readiness
- Identify gaps
- Avoid costly missteps
- Prioritize what matters

No pitch. No pressure.

Just a direct conversation about whether AI makes sense for your business - now or later.

Schedule a Call

maxrecall.com/schedule-a-demo