

Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

4003 Wood Street ● Erie, PA 16509 ● PH (814) 866-2247 ● <http://www.documentimagingreport.com>

October 7, 2016

THIS JUST IN!

EPSON SHOWS NEW WORKGROUP MODEL

At **Hyland's** CommunityLIVE event last month, **Epson** was showcasing its recently introduced DS-530 workgroup scanner. Rated at 35 ppm/70 ipm at 300 dpi in all modes, including color, the 530 is 5 ppm faster than Epson's DS-520 and lists for the same price—\$399. It also features a re-designed feeder with an enhanced roller system to reduce jams. There is a slow-speed mode for fragile documents, a multi-page skip mode for sticky notes, and dynamic skew correction. It offers TWAIN and ISIS drivers, can be set up to run 30 pre-programmed jobs, and can run with PCs or Macs. The DS-530 will be available this month through Epson's regular channels.

For more info: <http://bit.ly/epsonDS-530>

PremierOCR from Panasonic available

Late last month, **Panasonic** went live with the PremierOCR Solution we previewed in *DIR* this summer [see *DIR* 7/22/16]. Powered by **CVision Technologies**, PremierOCR has the ability to create highly compressed, fully searchable PDF documents from scans. It is being sold in two flavors, a 350,000 images-per-month version targeted at Panasonic mid-volume scanners, and a 500,000 image version targeted at high-volume scanners. It can also be acquired separate from a scanner to be run in MFP environments.

Some recent Tweets @DIREditor

Oct. 5: Former Microsoft executive Bernie Schweiss promoted to CEO of [@KnowledgeLake](http://bit.ly/KLakeCEO); Ron Cameron named Chair; <http://bit.ly/KLakeCEO>

Sept. 29: Innovative synchronization and integration features in [@DocuWare](http://bit.ly/DocuWare) Version 6.10 enable Hybrid Cloud Mode; <http://bit.ly/DocuWare6-10>

Kodak Alaris IM Sets New Marketing Course

Vendor focuses on addressing the problem of data chaos.

Back in 2013, after a memorable keynote by noted author and futurist Ray Kurzweil at its annual partner and customer conference, we wrote that going forward, the recently acquired Kodak Document Imaging wanted to be much more than a scanner vendor [see *DIR* 10/4/13]. Three years later, while what is now known as **Kodak Alaris** Information Management (IM) has definitely taken some steps in that direction, there is still work to do. Siddhartha Bhattacharya, who in January was named the organization's VP of marketing, recently spearheaded the launch of a new marketing initiative designed to push Kodak Alaris IM toward realizing its goal of evolving into a true solutions provider.



Sid Bhattacharya, VP of marketing, Kodak Alaris IM

The new marketing narrative is built around the concept of making sense out of data chaos. "We are putting a statement into the market that we have a larger purpose than selling scanners," Bhattacharya told *DIR*. "We are focusing on the rise of data anarchy, and trying to use this focus in a provocative way. People talk about Big Data, and from our perspective, 90% of the data in the world today has been created in the last two years. We want to communicate that our reason for existence at IM is to harness the value of that data. Kodak Alaris IM is uniquely positioned to accomplish this through a combination of our science, technology, services, and partner ecosystem."

We asked Bhattacharya if he could elaborate on what makes up these four areas. "We are dedicated to imaging science," he said. "We have R&D and patents, and under the hood—the brains behind it all. Our science has manifested itself in our technology—our hardware and software solutions. This includes award-winning scanners and a software portfolio that we

continue to build out. To complement that, we are nothing without our world class services and the support of our partner network. We feel that anything we do in the future will slot itself into one of these four pillars—whether it's new technology like our wireless scanners [see *DIR* 6/10/16] or the results of our continuing search for partners who will sell on value-add and sell solutions, addressing what customers are really looking for."

Evolving software portfolio

We noted that Kodak Alaris' focus on addressing data chaos and making sense of unstructured information reminded us of the strategy associated with the Info Insight software product that was launched a few years back but has since discontinued, in part due to a falling out with an OEM partner. "We have capture technology to address a wide range of customer needs," noted Bhattacharya. "We have a proven batch capture product with Capture Pro. More recently we've introduced Info Input for distributed capture, and have added to that with Info Input Express.

"Beyond that, we have renewed the focus on our partnership with AI Foundry (AIF)—our advanced solutions group [see *DIR* 11/13/15]. We work with AIF on mid- to large enterprise and strategic accounts. AIF brings solutions around actionable intelligence. This can involve many technological elements, including automated document classification and data extraction, as well as meta data generation and intelligent search. All this goes hand-in-hand with information management, and we had a strategy in place to address a lot of that with Info Insight.

"We strongly believe that our strategy and our plan were sound, but we ran into some problems with the partner we selected to fulfill our vision. We are going to continue to go down that path and have other suppliers lined up."

Bhattacharya also revealed that Kodak Alaris IM is working aggressively on a "cloud-first, open API, scalable capture platform." "We are doing things simultaneously, not serially," he said. "To broadly cover the market, we need to move fast.

"Overall, our IM software strategy is being built on four levels. On the ground floor, you have centralized capture addressed by Capture Pro. On the second floor, you have decentralized capture—scanning documents at the point of need, which is where Info Input is. Once you move beyond that, and look at the third and fourth floors, that is where we see huge opportunity. The cloud-first platform we are building out, which we are calling Intelligent Capture, will play a significant role. Beyond that, you move into our partnership with AIF, which is focused on the content insight world."

Where rubber hits the road

The initial manifestations of Kodak Alaris' new marketing initiative can be seen on its redesigned Web site, in the content of a new program aimed at service bureaus, and in a new distributed capture marketing program.

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DIR is the leading executive report on managing documents for e-business.

Areas we cover include:

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3. Forms Processing/OCR/ICR
4. Enterprise Content Management
5. Records Management
6. Document Output
7. Storage

DIR brings you the inside story behind the deals and decisions that affect your business.

Vol. 26, No. 18



Editor: Ralph Gammon
4003 Wood Street
Erie, PA 16509
PH (814) 866-2247
FX (412) 291-1352
ralphg@documentimagingreport.com

DIR is published 23x per year, on the 1st & 3rd Fridays of the month, by:

RMG Enterprises, Inc.
4003 Wood Street
Erie, PA 16509
PH (814) 218-6017
<http://www.documentimagingreport.com>

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"A lot of what was on our Web site previously was carried over from our legacy as part of Eastman Kodak," said Bhattacharya. "It didn't give you the most warm and fuzzy feeling, which is important because studies have shown that customers are now 60-70% through their buying journey before they even talk to a sales rep. Google is the first place they go, and we have tried to focus on what people are searching for beyond scanners and capture.

"People are searching for business process challenges in areas like mailroom automation, forms processing, records management, accounts payable processing, and customer onboarding. All those areas are now represented on our Web site. Prospects can connect to us during their purchasing processes, and we will connect them with the right partners in these areas."

For BPOs, many of which utilize Kodak Alaris' higher volume scanners, the vendor has launched a new campaign with the theme of "Redefining Science." "Much of the success that BPOs have historically enjoyed has been related to their providing a reliable service," said Bhattacharya. "But, like everyone else, they are now dealing with larger market trends like cloud and mobile. Their customers are looking to them for new services in these areas, and we'd like to help them transition from where they are now to being mobile and cloud ready.

"In addition, margin erosion for basic document services is accelerating. We want to work with our service bureau and BPO customers on going beyond cost cutting to create differentiation. We have done research and want to help them set themselves apart with new services that will enable their customers to adopt new technologies. We have created a global campaign around this. We are putting ourselves out there and offering our people as a resource. We want to position ourselves as true experts and partners for our BPO and service bureau customers."

Kodak Alaris' new campaign around distributed capture will target both end users and partners. "We are going to target key customers in the financial services, insurance, IT, and government markets through campaigns in social media and other areas. We are also going to team up with key partners like VADs and resellers. We think we have a unique story and a product line that is full of potential with our new wireless scanners and everything we bring to market with our software solutions. We want to drive that message into the market with our partners."

A systematic approach

Bhattacharya concluded by stressing that he doesn't consider Kodak Alaris to be a hardware vendor anymore, nor a software vendor for that

matter. "We want to be a systems company," he said. (When we asked for examples Kodak Alaris might emulate, Bhattacharya offered companies like IBM, GE, and Cisco.) "For that to happen, a lot of levers need to turn at the right time. This will have to happen from a market-facing perspective, as well as internally. It might take some time, but it will be setting us up for a strong future."

For more information:

<http://bit.ly/KodakAlarisDataChaos>

QAI Helps Konica Minolta Increase ECM Footprint

Like most printer/multifunction (MFP) vendors, **Konica Minolta** is continuing to diversify its business to add more document-related solutions and services to its mix. The latest move is Konica Minolta Business Solutions U.S.A.'s acquisition of Fulton, MD-based reseller and service bureau **Quality Associates, Inc. (QAI)**, along with QAI's wholly owned SharePoint-focused subsidiary **DocPoint Solutions**.

The QAI acquisition has several synergies with Konica Minolta's growing ECM practice:

- QAI is a leading Kofax reseller, especially in the federal government market, and Konica Minolta is a Diamond Kofax partner globally.

- In 2014, QAI was awarded a GPO 951-M Contract by **U.S. Government Publishing Office**, which Konica Minolta will be able to leverage to sell ECM solutions and SharePoint services into the federal government.

- DocPoint adds to a Microsoft SharePoint integration practice that Konica Minolta has been building with the help of two acquisitions—Hershey Technologies last year [see *DIR* 8/14/15] and Cold Cypress in 2011.

- QAI's service bureau business is complementary to the service bureau Konica Minolta acquired with AMS Imaging in 2014.

QAI/DocPoint represents the latest of several ECM-focused services businesses that Konica Minolta has acquired over the past few years. "This is our largest ECM-related acquisition in terms of people and revenue," said Sam Errigo, Executive Vice President, Sales and Business Development, Konica Minolta. "We did a lot of research on QAI and DocPoint; it is a highly respected organization with an unbelievable practice focusing on Kofax and SharePoint, and the service bureau fits very well with AMS's service bureau located in the Northeast.

"In addition, we did two acquisitions earlier this year for our core business [MFP and MPS sales] in the Baltimore/Washington area, which greatly expanded our sales coverage in the region. The QAI/DocPoint acquisition is strategic to our overall transformation strategy and will accelerate sales of ECM and BPO services into our customer base," Errigo said.

QAI Executive Director and DocPoint President Scott Swidersky couldn't have sounded happier that the deal had closed. "This is something we have been working on for the better part of 16 months," he told *DIR*. "We feel it's a real home run for our employees and customers.

"Our company has grown organically since it was founded more than 30 years ago, but we reached the point where we felt we had to consider an expansion strategy to keep pace with market demands. We had to consider a direction that was best for our company, employees, and customers. We had a number of conversations with venture capitalists, but we didn't feel that direction made sense because of the way they would manage the company going forward.

"As you know, Konica Minolta is going through an aggressive transformation process and pursuing IT services with a carve out for ECM. They had already acquired a few organizations with BPO and SharePoint services, as well as **Hyland** OnBase and Kofax practices. From our perspective, we felt we were directly aligned with what they were trying to become. The only question we had was 'Could they successfully integrate a company like ours?'"

Swidersky said that after much careful examination and consideration, the QAI team decided the answer was yes. "Of course, validation efforts happened from both sides," he said. "At the end of the day, you meet in the middle after many compromises where you hammer everything out. We talked to many organizations, but we felt only Konica Minolta could bring the type of value and ongoing investment required for long-term success. We didn't see anybody else in this space that had a really stable plan to help us develop beyond the footprint we have created. The reach and support of Konica Minolta should help us gain access to a lot of clients we don't currently have."

Swidersky noted some of the ways that QAI and DocPoint employees will benefit from being part of a



Sam Errigo,
*Executive Vice
President, Sales and
Business
Development,
Konica Minolta*

larger organization. "As a relatively small business, we could not negotiate anything as great as Konica Minolta when it comes to health insurance and retirement plans," he said. "In addition, working for a larger operation like Konica Minolta will create broader opportunities. We are mostly a mid-Atlantic operation. Now our staff members will be able to look at opportunities available throughout Konica Minolta."

Swidersky will remain on board as president of QAI and DocPoint, which will operate going forward as wholly owned subsidiaries of Konica Minolta. "We were able to set up a solid employment agreement going forward," said Swidersky. "That's how a strategic business acquisition works—it shows that the acquiring company values your business."



Scott Swidersky,
*president, QAI and
DocPoint Solutions*

Errigo concurred that Konica Minolta considers the employees at companies it acquires to be valuable assets. "One of the things we look at with all our acquisitions is the management team's desire to expand and grow their operations versus selling the company and leaving," he told *DIR*. "We are looking for teams that do an unbelievable job with their customers and employees and are at the point where they think they can do more but need the backing of a larger organization like Konica Minolta."

The terms of the deal were not announced. **Xamcor**, which specializes in developing M&A opportunities in the information management market, represented QAI in the negotiations. "QAI was able to get a valuation that was within the industry standard based on its revenue and EBITDA," said Paul Carman, president and CEO of Xamcor. "I think the deal shows that services are still important to companies. It is also a validation of the potential in the federal government sector."

Swidersky wanted to make it clear that QAI was not under pressure to sell. "Because there is so much consolidation in the industry, and some of it involves companies moving in the wrong direction, people have been asking me, 'is this a distressed sale?' The answer is no. We were well valued by Konica Minolta, and they met all our terms and expectations. Their interest in us was as a strategic buyer that wanted to take our talent and resources and enable them to move forward.

"Our alternatives would have been to sell out to a competitor or a VC, but either of those avenues

would have likely led to some optimizations, which would have affected our employees, and we didn't want to go that route. We could have continued to operate as we were, profitably growing four to 10 percent per year, but we are excited to have the opportunity to accelerate our growth, expand our market presence and leverage the Konica Minolta horsepower behind our engine."

More to come

Konica Minolta is not finished growing its ECM footprint. "We are going to continue to buy in the ECM services space; we will focus on companies that specialize in Hyland OnBase, SharePoint, and Kofax," said Errigo. "We will also continue to expand our BPO services in select markets to increase our coverage model. In the south, for example, we have an existing sales operation that we are looking to expand through acquisitions. It would be a bonus if the companies we buy have BPO services.

"It is our plan to selectively build out BPO as part of our core practice. Between QAI and AMS, we already have talented people who know the BPO space. We are not interested in focusing on high volumes at low margins. There are already plenty of providers in that area who we can partner with if needed. We are more concerned with being able to add value to a workflow—utilizing the same technology we sell to companies but offering it as a service."

Errigo concluded that Konica Minolta will focus on executing its transformation vision and strategy. "We will continue to invest in the companies we acquire—to retain their people and foster growth and opportunity," he said. "If organizations in the ECM space are interested in learning more about Konica Minolta and our growth strategy they can contact us anytime. We are easy to check out. We've done five ECM acquisitions in the last few years, and have been successful in retaining the employees, management teams, and customers, while growing their businesses."

For more information: <http://bit.ly/KM-QAIPR>
<http://xamcor.com/>

Using Intelligent Capture to Make Faster Decisions

For years we've talked about improving efficiencies with automated data capture. According to ECM/BPM industry analyst Sandy Kemsley, that sort of functionality is now table stakes when playing in the document capture market. As we move into the age of digital transformation, the true payoff for

capture is in improved process turnaround times.

We spoke with Kemsley recently in advance of her keynote at the upcoming **ABBYY** Technology Summit, being held next month in San Diego. There she will be speaking on how "Digital Transformation is Increasing the Value of Capture and Text Analytics." "My goal will be to help ABBYY's partners come up with new ways to use their technology that will help their businesses," Kemsley told *DIR*.

Kemsley founded a document imaging and workflow integration firm in 1987, before moving on to FileNet briefly in 2000. Since then she has been working as a BPM systems architect as well as market analyst. "It used to be that our technology was all about gaining efficiencies," she said. "Automated capture was focused on getting the cost of people out of the process. But, I don't think that's the big payoff anymore. Today's focus should be on providing better service through shorter cycle times."

Kemsley explained how both traditional capture and semantic understanding [where ABBYY's Compreno tools play] can be utilized for this. "The goal is to create more straight-through processing where it's applicable, such as in a property and casualty claims process that doesn't involve high values and there isn't a high risk of fraud," she said. "In that situation, an insurer might set up a self-service application, where their customer fills out a form on a mobile phone, takes some pictures of the damages and a proof of loss statement, and submits everything for adjudication. If it can all be processed automatically, the user might get a response back almost immediately telling them their money is on the way to their account.

"The advantage for the insurer is that the customer and capture software are handling all the data entry, so it makes their operations more efficient. The customer is happy because of the fast turnaround time."

Indeed, at the recent **Harvey Spencer Associates** Capture Conference, noted technology author Chris Surdak listed "immediacy" as one of the six challenges that organizations need to address as they embrace the digital transformation. "Quality" is another and it can also be addressed by strategically deployed automated capture. Kemsley explained how semantic recognition can be utilized to provide people and systems with better context which they can use to make decisions.

"Let's look at a loan application process," she said. "Historically, it has been very paper intensive. You

might need documents like proof of employment or a letter of reference. Proof of employment could be a pay check stub, which is fairly structured, and the information can likely be captured automatically, but a letter is fairly unstructured by nature. This is where semantic technology comes in.”

Kemsley sees an opportunity for advanced capture to be used in conjunction with BPM, case management, and decision management software. “If you look at processes like insurance claims and loan applications, they are highly regulated,” she said. “As long as you follow a set of rules, the decision should be fairly straightforward one way or another. The goal is to capture as much information as you can up front, so that a decision can be made efficiently. If all the right information has been captured, that decision might be able to be completely automated. Of course, there could be other factors as well, and in some cases a person will have to look at the information. If the case does have to be manually addressed, you want to reduce the amount of work a person has to do to make a decision by giving them as much relevant information as possible to work from.”

Kemsley sees BPM software providers adding more decision management capabilities into their offerings in the future. “Decision management platforms are based on rules with analytics underneath,” she said.

As the digital transformation envelops the market, Kemsley warned that organizations will be forced to adopt more advanced capture and automated processes. “There is always going to be distrust by people who don’t think software can accurately read documents or make decisions on who to give a loan to or how to settle a claim,” she said. “But, in the future, we won’t have to worry about these types of companies because they will be going out of business.”

“The leaders in the market going forward will have fully online services that appeal to an emerging customer base that wants to do self-service. Fintech start-ups are already proving this can be done. And some more established organizations, if not outwardly embracing this type of automation, are spinning off separate brands that are.

“The key is to be able to combine intelligent, accurate capture on the front end, while using rules-based decision management on the back end. Good data capture is needed to make appropriate decisions— both automated and manual.”

For more information: <https://column2.com/>;
<https://www.abbyytechnologysummit.com/>

BPL Templates Gaining Traction for Laserfiche

In our coverage of this year’s **Laserfiche Empower** conference [see *DIR* 1/25/16], we noted that when new features in Laserfiche 10 were being discussed “the introduction of what Laserfiche has termed its “Business Process Library (BPL) received a loud round of applause.” The BPL is a series of templates, including e-forms and workflows, designed to speed up deployment of common vertical and horizontal processes.

Laserfiche currently has more than 50 templates available in its BPL and recently announced an HR package at the annual **Gartner Catalyst** Conference held in San Diego. *DIR* caught up with Catherine Ramos, director of product marketing at Laserfiche, and discussed the success Laserfiche has been having with its BPL so far. “What we launched at the Gartner event was a specific selection of HR processes that hinged on our PeopleSoft integration,” Ramos told *DIR*. “Most of the templates are part of the employee onboarding process, which is something that everyone who hires people has to deal with.”

The templates shown at the event included job requisition, Family Medical Leave Act tracking, employee status change notification, and travel and expense requests. “These templates are not something you can drop in out of the box and run with,” Ramos cautioned. “They get a user about 80% of the way toward an application, but the organization still needs to configure them to meet specific roles and responsibilities. This shouldn’t require any custom coding. It involves steps like going into drop downs and plugging into Active Directory.”

Any user with a Laserfiche Forms license has access to the BPL. Prebuilt process diagrams, forms, workflows, and reports can all be downloaded as part of a template. “There is also documentation that can explain how to expand a process,” Ramos said. “For example, if a user wants to add mobile capabilities to introduce capture in the field, there might be an example of how to configure that.”

Ramos noted that a Laserfiche partner would typically help with configuration. “There is no charge for the downloads, but there may be some cost associated with deploying them,” noted Ramos.

According to Ramos the most popular BPL download to date has been for a template to fulfill eFOIA requirements related to public records requests. This is not surprising due to the large

number of state and local government entities that use Laserfiche. “Our software can be used to automate the entire process, make it transparent, and ensure that requests are fulfilled,” Ramos said. “Outside of government, we’ve had quite a bit of interest in our HR and finance templates.”

Ramos said the vision for the BPL goes back to Tom Wayman, former VP of marketing and product strategy at Laserfiche, who passed away in 2013. “Tom had this vision for a solutions exchange,” she told *DIR*. “This was reflective of our strong presence in the government and education markets, who don’t hold everything as close to the vest as organizations in the private sector. If you go to the solutions exchange on our Web site today, you can see many case studies. Some of them include screen shots and folder structures.

“Tom oversaw a team dedicated to constantly updating that page and getting new stories. With the BPL, we have taken this concept a step further and given users materials they can actually download to get their applications started.”

Templates are currently available for the construction, education, and government verticals. There are also several cross-industry templates. “I expect the next evolution will involve more integration with line of business applications, like we’ve done with PeopleSoft,” said Ramos. “Also, as adoption of Laserfiche Forms continues to grow, we will be encouraging our community to build centers of excellence around their specific expertise and to publish and share their own processes. A group of counties in North Carolina is already creating its own library of standardized processes that can be deployed throughout the state.”

For more information:

<https://www.laserfiche.com/feature/business-process-library-bpl/>

Kofax Addresses Digital Transformation, Mobile First

It was more than three years ago that Kofax first introduced a marketing message built around automating the “First Mile” of customer interactions. A lot has happened since then, including the well-chronicled acquisition of Kofax by **Lexmark**. In addition, a new term has emerged in the market, which may actually better define what the ISV, which is now part of Lexmark Enterprise Software (ES), does for its customers. That term is “digital transformation,” which is one of the hottest buzz phrases in the IT market today.

“While we continue with our First Mile messaging, we have found that customers view what they are doing with our technology as part of their ‘digital transformation’ strategy,” said Russ Gould, senior director, product marketing at Kofax, a Lexmark company. “In a lot of cases, we are helping them go from the paper to the digital world. They are looking for us to help them make this transition, and we have a lot of technology to help them.”

In fact, Lexmark recently issued a press release highlighting five upgrades to products in the Kofax line. These include Mobile Capture, Kapow (robotic process automation), Insight (analytics), SignDoc (digital signatures), and Claims Agility (healthcare claims capture). “One of our strengths is our unified approach—taking all the technology we have and working with customers to understand their needs and what we can do to help them start their digital transformation,” said Gould.

Gould added that mobile is often the first thing they want to look at. As one of its recent upgrades, Lexmark announced several enhancements to the Kofax Mobile Capture platform. This platform was originally introduced back in 2012 [see *DIR* 1/20/12].

“We are seeing traction for Mobile Capture in a number of markets, but retail banking and insurance are far and away the leaders,” said Gould. “The primary use case, regardless of industry, is customer onboarding.”

What makes this particularly intriguing is that onboarding usually doesn’t involve an app. “The users are not yet customers of the service they are signing up for, so they likely haven’t downloaded the app,” said Gould. “They end up working through a browser interface and maybe taking a picture of an ID card that can be uploaded to a server where our technology is used to automate data capture.”

Gould estimated that there are more than 100 businesses currently utilizing Kofax Capture. “This includes a lot of big name customers,” he said. “Unfortunately, we haven’t been cleared to mention their names.”

New Mobile Capture features include an on-device OCR option, a framework for capturing data from credit and debit cards, and pre-built analytics and dashboards. “While there was some demand for on-device OCR from our customers, the impetus also came from our desire to push the envelope,” said Gould. “We are not the first vendor to offer this, but we believe we have created the smallest implementation.

“It’s designed to help our customers improve the

