Intake Management

By utilizing OpenText Capture Center and Process Suite BPM, our Customer was able to automate document intake, significantly reduce their operating costs, and decrease processing time

Turning "Chaos" to "Cadence"

Business Problem

For most businesses, every day, every hour, every minute new incoming documentation in the form of correspondence, forms, applications, and other related content is received. Once received, there is considerable time and effort to recognize, organize, and distribute this documentation to the responsible departments for processing. Most of this is typically done manually and it's not uncommon to have duplicates of processed work distributed, documents sent to the wrong department, or delays in getting the work processed due to the document sitting on someone's desk or getting lost in the shuffle. When this happens, not only is time wasted on the mishandling of the documentation but also in correcting the mishandling. Most departments have formal procedures that are in place **only** to correct a potential incoming error. The end result is a matter of "chaos" and that costs a company time, resources, and most importantly, money.

ClearCadence worked closely with one of their mid-sized customers within the Legal and Business Services sector who had a large portion of their staff focused on clerical processing. The customer had a goal to reduce this staff 50% via automating the manual work of sorting, identifying and delivering incoming documentation throughout the company. Since labor costs were by far their biggest monthly expenditure, reducing the staff in this regard would dramatically affect their bottom line.

In addition to reducing labor costs, the company was also suffering from decreased revenue due to missing key milestones within their work processes. The reason they missed these milestones? Lack of automation to handle identification, delivery, auditing and tracking of all of their incoming work.

Solution

The customer chose the ClearCadence team who worked closely with their senior executives, business owners, and the IT staff to analyze, architect, design, develop, manage and implement a comprehensive solution to their intake challenges.

One key component of the solution was the utilization of OpenText's Capture Center platform to allow documents to be scanned, captured, indexed and recognized automatically based on variables read directly from the scanned image. This information was captured either through optical character recognition (OCR) from the image, recognizing the form through forms recognition, or by classifying certain forms up front prior to scanning.
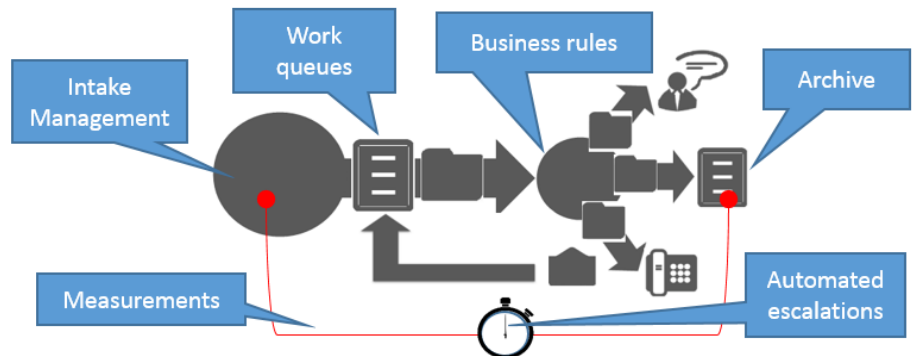
In addition, information that was captured was integrated with in-house case management systems to pull relevant data relating to the documentation, and in some cases, send an update to those systems. Using OpenText RedactIt technology, the solution was also designed to automatically redact personally identifiable information (PII) to ensure the data was kept secure at the start of the workflow versus somewhere in between, or worse, never protected at all.

Once the capture process is completed, the document is handed off to a New Business Intake (NBI) process workflow application built with OpenText's Process Suite BPM software to automate the routing and delivery of the documents to the correct downstream departments. By capturing and identifying the various types of documents up-front, directing them became an easy matter with little to no human involvement required. Within the BPM workflow, timers were utilized and set for each work item to ensure proper handling within stated service level agreements (SLA's). If an item was untouched or unprocessed for too long, automatic escalation of the item was handled by the BPM engine. This allows the customer to meet their milestones which in turn equates to satisfied customers and achieved revenue attainments.

These solution components combined ensure that their intake documents were no longer in danger of being "chaos-in" but "cadence-throughout."

Benefits

Since implementing the solution, ClearCadence's customer has seen immediate improvement in getting the right work to the right people in a timely and efficient manner. However, the key driver that allowed this type of solution in place was the up-front analysis and documentation of the customer's varied work types performed by the ClearCadence project team.

The long term benefit of utilizing the OpenText Capture Center software is fewer people needed to handle the mundane tasks of identifying incoming documents, delivering them to the right department and, in some cases, manually having to key from the document itself.

In addition, the ability to track the length of time each work item has been in the workflow has allowed the company to fine tune and meet their stated milestones

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and ensure they do not lose out on expected revenue. Lastly, having these metrics in place and the ability to measure where their longest processing cycles occur and allow them to focus on improving those areas to bring better efficiencies, is another key benefit. The end result is constant process improvement.

Why ClearCadence?

ClearCadence has the experience and resources necessary to help you get the most out of your business process improvement investment. We offer the right combination of the industry's top consultants and solutions to help you meet your business objectives.

ClearCadence Professional Services deliver:

- Expert consultants who truly understand integration, technology and business process challenges in your industry
- Trainers experienced in knowledge transfer
- 100% client satisfaction

ClearCadence is committed to your success and to building a long-lasting relationship that helps you realize a strong return from your investment. Let our team help you take full advantage of BPM disciplines and technology by analyzing your business and system processes, identifying issues, and transforming them into efficient solutions.

Over 20 years' experience helping Global 2000 companies solve their complex BPM challenges. Let us be your go-to partner.

For more information on how ClearCadence can help you, please email Sales@ClearCadence.com or call us at +1(813) 659-5405

ClearCadence
Process, Improved.