Financial Services Case Study

Mailroom Scanning Solution Transforms Business Processes

An asset management firm increases efficiency and reduces costs with a fully integrated scanning solution that tracks customer communication.

XEROX® DOCUMATE® DEPARTMENTAL SCANNERS

We offer award-winning document capture solutions for personal, departmental and production applications. Xerox® scanners unlock the data in routine, daily paper documents to enable today's connected, digital workplace. Our software-driven hardware solutions provide the onramp to digital transformation.

Xerox® DocuMate® departmental scanners provide high performance and great value for large workgroups. Visioneer's exclusive OneTouch software, Acuity image enhancement and DriverPLUS technology provide unparalleled simplicity, performance and integration.

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THE CHALLENGE

Our client, a Netherlands-based asset management firm oversees around €250 billion each year. Because they handle financial transactions, they must keep accurate records of all customer communications to meet industry regulations.

This created an overabundance of documents in multiple departments. The asset management firm wanted to scan and archive the documents, and they wanted the process to start in the mailroom—the first department to receive incoming customer documents. But their existing process was slow and manual, with more than 10 staff members responsible for scanning, indexing, archiving and notifying employees of new files. This put them at risk of serious financial consequences.

THE SOLUTION

We developed a simplified, integrated mailroom workflow solution for our client. The enhanced scanning and archiving environment centered around a Xerox® DocuMate® production scanner and a suite of intelligent capture applications, including Visioneer® OneTouch® software.

OneTouch enables high-speed image capture with automatic routing to pre-specified destinations. The scans integrate directly into the asset management company's existing Linux architecture. The whole workflow is controlled with the touch of a button. The company was so impressed with the Dutch office's success that they purchased another DocuMate® production scanner, with plans to roll out the solution to all their European offices.

THE RESULTS

Intelligent scan and archiving rules help eliminate waste and minimize costs. Now employees can monitor scan and archiving activity to ensure tasks are complete and deadlines are met. The solution sends alerts when an item hasn't been opened in two days. This helps employees stay abreast of updates and business processes stay efficient.

The asset management firm reduced storage needs by reducing file sizes. Now they can scan a small card and save it to the original size instead of creating a full-size scan. They've also reduced manpower by 50% and cut document management costs by about 30% per year. By simplifying and automating document process workflows, our client is enjoying greater performance at lower costs.

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