

# Automating Document Management

How Jersey Post can improve efficiency and reduce costs

## 'Utility Company'

*Working with Jersey Post on document management enabled 'Utility Company' to not only save around £18K p/a but also reduce office archive space and improve workflow efficiency.*

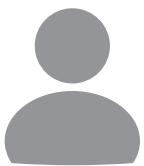
## The Background

A 'Utility Company' company has a large number of paper forms, invoices and statements that need to be stored in order to comply with regulatory requirements, but also for staff and customers to access as and when required. Storing hardcopies takes up an increasing amount of costly, physical space and takes staff a considerable amount of time to sort and access when customers make enquiries.

In order to overcome these issues and make the process more efficient, 'Utility Company' was interested in scanning, indexing and storing these documents electronically, but was concerned about time, expertise and the financial resources required to purchase the associated hardware, software, licences and training.

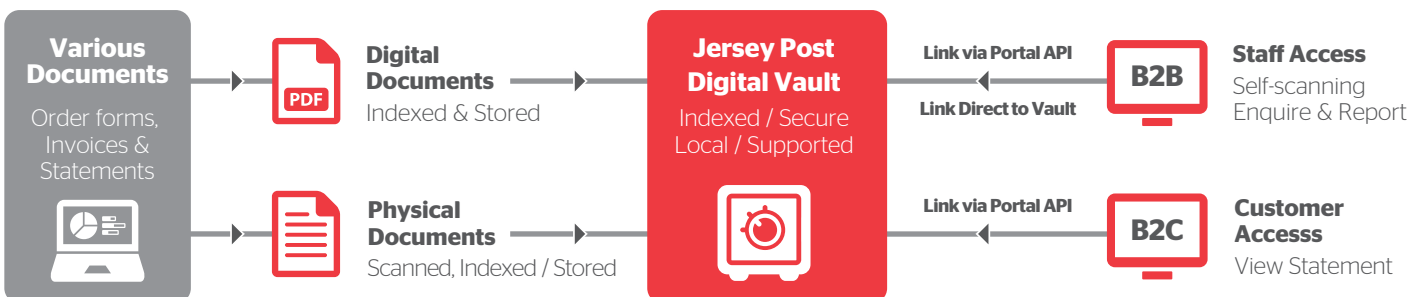
## The Solution

Jersey Post provided a document management service that enabled 'Utility Company' to have all customer documentation scanned, indexed and uploaded to an online storage 'vault'. This 'vault' can be quickly and easily accessed by employees looking for client information, but is also accessed by customers wishing to check their own account information and statement details.



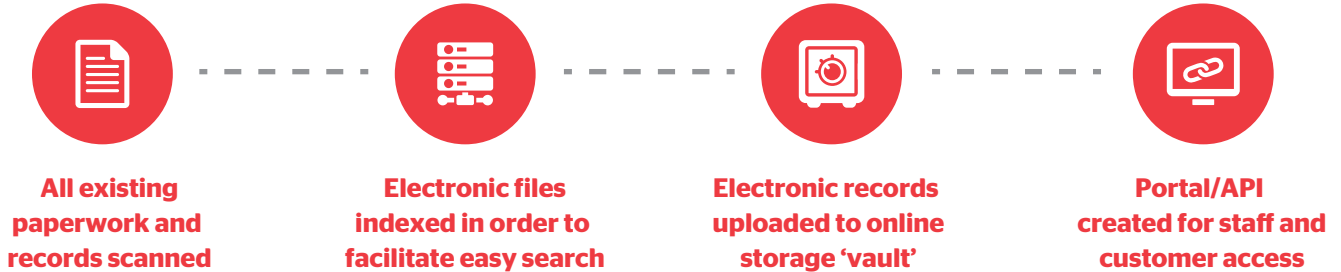
*"Jersey Post's document management services have not only reduced the amount of time our staff spend looking through client records, but also enabled customers to self-serve with the online customer access portal. In the last 6 months, calls to customer services have reduced by 9% and not only have we saved money on printing and storage costs, but we have also reduced the amount of overtime paid for paperwork filing."*

**Managing Director - 'Utility Company'**



## The Process

Given the large amount of existing paperwork, Jersey Post worked with the organisation to back-scan records and bring the company records up-to-date. Jersey Post also provided implementation, training and support to the 'Utility Company' for the ongoing self-management of document scanning, indexing and archiving. The process took just 8 elapsed weeks.



## The Advantages

The benefits to the organisation of implementing such a service were numerous.

### Efficiency

A key benefit was that of improved operational efficiency which freed up staff from time-consuming archive searches and enabled them to focus on their core roles serving customers.

### Reporting and MI

With customer information stored electronically, these files now become useful sources of important reporting and management information which was not possible with the original hardcopy records.

### Financial Savings

'Utility Company' has made significant savings in print and storage costs, but has also dramatically reduced the amount paid to employees in overtime for paperwork archiving.

### Customer Service

Customers receive a quicker, more efficient query resolution when contacting the organisation as searches can be conducted almost instantaneously with hotkey, index and text search options.

Customers can also choose to securely self-serve with the addition of an online portal/Application Program Interface access which, over time, reduces the number of calls made to the organisation.

### Regulatory Compliance

In an increasingly more regulated environment, archiving and retaining electronic documents has enabled 'Utility Company' to retain only those business-essential items, yet still keep a detailed audit trail for all documents required for local legislation compliance.

## The Savings

By choosing Jersey Post's document management service, 'Utility Company' gained from significant advantages over time, including:



*This case study is based on a real-life, working example of a local organisation currently working with Jersey Post. The name of the organisation has been removed in order to retain client confidentiality.*