

# CASE STUDY FINANCE INDUSTRY

### **Scrutton Bland**

eCopy™ solution for effective incoming mail distribution workflow

#### **CHALLENGE**

 Scrutton Bland needed to merge paper and electronic workflows to overcome a mail distribution problem. Incoming post was being sorted twice, it was initially being scanned onto the server and then sorted into the document management system separately and was hard to retrieve. The organization needed a system that would enable the staff to sort post effectively and do away with paper files altogether

#### **STRATEGY**

 Integrated eCopy ShareScan<sup>™</sup> and eCopy Connector for Interwoven WorkSite on the multifunction peripherals (MFPs) with Scrutton Bland's Document Management System, Interwoven WorkSite

#### **RESULTS**

- Now Scrutton Bland scans incoming post directly into the Document Management System in the morning on their MFPs and distributes it directly to the PC of the person responsible. The audit trail of the document starts immediately
- Speeds up internal mail distribution because people immediately receive their post electronically
- Enables Scrutton Bland to do away with paper files, to free up storage space and return 10 desks to the office
- eCopy ShareScan is easy enough to be used by everyone in the company

#### **ABOUT SCRUTTON BLAND**

Scrutton Bland is an accountancy practice with one hundred and sixty employees and offices in Ipswich and Colchester. The organization offers a wide range of services, including traditional accountancy services as well as more innovative business advisory and development services. The company also includes Independent Financial Advisers and Insurance Brokers.

"People want immediate responses these days, and the eCopy solution means we can retrieve documents with no delay resulting in improved business processes and happy clients."

James McElhinneyPartnerScrutton Bland

## PREVIOUSLY SCRUTTON BLAND ENCOUNTERED PROBLEMS MANAGING...

their incoming post because they would sort it before putting it on the Document Management System. The process made it difficult to find on the server and there was often a delay between the time a piece of post was received and getting it to the person who needed to act upon it. In addition, incoming post could easily get misplaced. Clients called wanting immediate responses on things such as their tax returns, but this was difficult to do instantly with the old system as documents couldn't be retrieved quickly. Scrutton Bland also had space and storage issues with the amount of paper files taking up space and wanted a solution that meant they could do away with paper files altogether.

### ECOPY SHARESCAN ON THE MFPS HAS ENABLED SCRUTTON BLAND TO...

improve the incoming mail distribution workflow considerably. They can now scan the post as soon as it arrives in the morning. This ensures there is an audit trail on the post immediately and avoids documents getting misplaced. Scrutton Bland needed a solution



#### **Scrutton Bland Case Study**

to fit into their existing Document Management System Interwoven WorkSite which could easily be done with eCopy ShareScan and eCopy Connector for Interwoven WorkSite. This has enabled paper documents to be easily transferred to electronic documents and delivered to any individuals' PC in the shortest possible time. The new system is very easy to use since anyone can scan the post in, allocate it, and press send to lodge it into the Document Management System where it can't be misplaced. All the staff can use it rather than just the support staff which has speeded up internal processes greatly.

BY INTEGRATING THE ECOPY SOLUTION WITH SCRUTTON BLAND'S EXISTING...

Document Management System, locating documents is easy by the creation of individual customer files that are easily retrieved from any workstation.

Now when a client calls with a query on their tax return, Scrutton Bland can instantly search their document history. They have also been able to give clients access to their own directories so they can view their own postal trail and tax returns. This has speeded up business processes and improved customer service levels.

The solution has also enabled Scrutton Bland to back-scan all their old paper files which were created before the implementation of a Document Management System. They have been able to reduce their paper usage and get more functionality out of e-mail by using this as their method of document delivery rather than the postal system.

The cost savings for Scrutton Bland have proved substantial in both labor and time. The solution helps to reduce the amount of staff required to sort post and speeds up communication and responses to incoming mail.

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