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Bedell Group

Bedell plans for success

CHALLENGE

- To move to electronic documents for primary record storage
- To reduce the volume of hard copy documents archived
- To improve the firm's access to documents

STRATEGY

- To deploy Nuance eCopy ScanStations and 10 new Multifunction Printers (MFP)
- To integrate Nuance eCopy ScanStations with Interwoven Worksite, Rightfax, Microsoft Exchange and Copitrak
- To replace fax machines

RESULTS

- Greatly improved and much faster batch scanning process
- Business continuity assured in the event of a disaster
- Several tonnes of paper filing dispensed with

The adage that you 'don't plan to fail, you fail to plan', is a reminder to consider many potential 'what if?' situations. Offshore law firm and independent trust company Bedell, has always taken business continuity planning very seriously. Several years ago, it invested in Nuance eCopy technology to allow scanning directly into its document management system. Since then – and as part of its business continuity planning - Bedell decided to adopt the electronic document format as the firm's primary business record. By ensuring every relevant document was scanned and filed, Bedell's resilient infrastructure would allow them to be available if a flood or fire for example were to damage or destroy its head office and the important business, administration and client files stored there. With over 300 partners and staff across key financial centres in Jersey, Guernsey, London, Dublin, Geneva, Mauritius, BVI and Singapore, not only was it key to keep documents safe, but also easy for everyone in the firm to access them quickly and securely. This contingency plan not only ensures the security of and access to important information in the event of a disaster, it also reduces the reliance on more vulnerable paper-based documents. Stephen Chiang, Head of Group ICT, Bedell Group Services Limited, explains

"We need to be able to be up and running very quickly if a building is damaged in a disaster or if we are denied access to our premises."

As an industry that's facing increasing regulation and pressure on pricing, it is essential for Bedell to keep up with the pace of technological change to benefit not just business continuity, but also productivity, its service to customers and of course, security. To ensure this, Bedell deployed a fleet of 10 new multifunction printers and 13 scanners.

More recently, it also updated and built on an existing investment made in Nuance's Imaging solutions. These include Nuance eCopy ScanStations – which are secure kiosks for network scanning applications that demand high security, enhanced accessibility, faster index-data entry, or connectivity to MFPs and for scanners that don't support embedded scanning and OCR solutions.

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In Bedell's case, it features integration with HP/Autonomy Worksite, Rightfax, Microsoft Exchange and Copitrak. Procured through an authorised Nuance reseller, the combined solution enables the firm to transfer digital files into the Worksite document management system, with RightFax providing the fax service.

The fleet of devices has a Nuance eCopy ScanStation terminal attached to facilitate scanning and is distributed across four floors of the five storey office in Jersey and in various parts of its other offices. This improved workflow enables users to scan once and send their documents to multiple locations, including to email, to a printer, fax or the firm's document management system.

The combined eCopy solution continues to provide an effective means of simplifying physical document storage within the context of an electronic filing model. The scan devices are used by filing clerks who have the dedicated role of scanning backlogs in batches. In addition to the filing clerks, the firm's business support functions also depend on the MFPs, including human resources, marketing, financial management and IT teams. Now that scanned documents are text-searchable and files are easily accessible through a single logical view, regardless of their paper or electronic origin, accessibility and responsiveness at Bedell have been improved. To ensure document security and client confidentiality, there are two separate authentication processes to clear when using eCopy ShareScan.

One long term benefit of the company's workflow process is that it removed *"several tonnes of paper, and saved the production of even more"* according to Stephen. He added: *"We didn't want to store any more than necessary, as it was just taking up too much space. The move to an electronic storage model has made a considerable difference."* The company was also able to dispose of its old fax machines, as this function is integrated into the MFPs. The benefits also extend to the service the company provides to its clients by delivering greater transparency with respect to cost recovery. *"It's now easier to provide evidence of soft costs for clients on their invoice, for example,"* Stephen stated.

As well as the ROI, the new devices have been praised by their users. Stephen said: *"We have had very positive feedback. The scanning function is easier and quicker. Most people see the positives of the solution and how it benefits them day to day. As Group Head of IT, I would be in direct receipt of feedback if users were unhappy or complaining about the set up."* Which indicates that the plan to make further investments in Nuance eCopy ShareScan, has been a true success all round for Bedell.

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