

# PaperVision® Enterprise Greatly Improves Member Satisfaction for Randolph-Brooks Federal Credit Union

Organized as a cooperative, not-for-profit financial institution, Randolph-Brooks Federal Credit Union is managed by a volunteer Board of Directors. Each director is committed to establishing policies which save members money and provide them with excellent customer service.

Randolph-Brooks' goal was to increase customer satisfaction regarding transaction document requests (i.e. withdrawals, deposit tickets, money orders, change in account, etc). When members requested a transaction document, they had to wait seven days. With the installation of PaperVision® Enterprise, employees can now fulfill multiple transaction document requests for members within minutes, which greatly improved customer satisfaction and saved them money!

## Key Benefits

- Improved customer service and member satisfaction
- Increased operating efficiency
- Simplified training for all employees
- Enhanced document storage and security
- Boosted employee performance and morale

## *The Situation*

Randolph-Brooks Federal Credit Union was founded by nine people on September 26, 1952, as a not-for-profit cooperative on Randolph Air Force Base in Universal City, Texas. Each member deposited five dollars. Randolph-Brooks now has more than 178,000 members with total assets exceeding \$2.3 billion and 22 branches throughout Texas, making them one of the largest credit unions in the southwestern United States.

Originally, tellers at each location were instructed to scan their daily transaction documents and to burn the information to a CD, which was then catalogued and duplicated. This gave them a working copy (for research requests) and an archive copy of each transaction document. Each branch did their own scanning, which meant that there were twenty-two different formats and methods. This inconsistency made documents difficult to locate and reproduce when needed. In addition, many documents were hard to read once they were found.

In order to become more uniform and to ensure the quality of the documents scanned, Randolph-Brooks decided to centralize the scanning at their headquarters, which began receiving 25,000 documents per day. Although this initiative did improve the quality of the digital documents, it was still a time-consuming task to sort through the extensive inventory of CDs in order to locate a single transaction record.

Under the centralized system, employees had trouble keeping up with the volume of scanning required, even when they added additional scanners to the central location. Employee morale was low, and there seemed to be no end in sight. At the branch locations, individual tellers were frustrated by long wait times to retrieve needed information for their members. With tens of thousands of transaction documents being generated every day, customer requests for copies of everything from canceled checks to deposit slips took at least seven days, and the tellers felt badly about not being able to respond directly to their members. In some locations, individual tellers were so anxious to assist their customers in a timely manner that they were contacting the central office to beg and plead that their request be moved to the top of the stack!

## *The Solution*

Digital Storage Solutions, a Digitech Systems reseller based out of New York, installed PaperVision Enterprise for Randolph-Brooks Federal Credit Union in November 2004. Randolph-Brooks continues to scan in one central location, but instead of burning information

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to a CD, employees now load the data into PaperVision Enterprise. The system is hosted on the company's internal computer network, which enables employees at any branch location as well as headquarters to access and retrieve any document right from their workstation in seconds. PaperVision Enterprise has completely replaced the CD archive retrieval system they had in place previously, and because it is so easy to use, all Branch Managers were trained in less than one day.

## **Recognized Benefits**

By utilizing PaperVision Enterprise to retrieve transaction documents, employees of Randolph-Brooks don't have to dig through hundreds of CDs to find requested documents. They can pull up information right from their workstations without ever having to get out of their chair. Index values allow them to instantly locate all documents associated with a specific member, transaction, or account.

These reduced document retrieval times have dramatically increased member satisfaction. Instead of submitting a request and waiting the standard seven days, members can simply walk up to the teller, tell them what they are looking for and get a copy of the transaction document while standing at the counter. When a phone request comes in, employees can fax or email a copy while the member is still on the phone.

Employees were previously frustrated by the delay in providing members with their document requests. PaperVision Enterprise has increased morale by giving employees the ability to provide instant member satisfaction to the credit union members.

Installation of PaperVision Enterprise was easy and training the employees of Randolph-Brooks was a snap. Branch Managers were trained in less than a day, and training for the remaining employees was actually done via memo, which contained log in instructions and a phone number to call with questions. The memo went out to more than 300 users throughout the company that will be utilizing the new system and employees are now able to capture and manage over 25,000 documents a day, an increase of over 400 percent.

"As a Manager, you know you can feel confident in your decision when a new business process you've implemented helps achieve mission-critical goals with a clear return on investment," states Charlotte Norton, the VP of Member Service Operations for Randolph-Brooks. Glenn Grilli, their Digital Storage Solutions representative states, "PaperVision Enterprise helped Randolph-Brooks achieve their goal of increasing member satisfaction by placing documents securely at their fingertips."

## **About Digital Storage Solutions**

Digital Storage Solutions accelerates business processes and reduces costs by collecting paper and electronic documents across organizations, transforming them into retrievable information, and delivers them to line-of-business applications, databases and archive systems.

Our team of professionals leverage extensive industry and technology experience and flexible tools and methodologies to successfully deliver solutions that produce results. As business systems integrators, we align our clients' business processes and information systems to enable them to access the right information at the right time. From Capture to Archive, we have empowered hundreds of businesses to achieve their desired business results and create enterprise value.

To learn more about Digital Storage Solutions, call toll free at 1-800-435-2952 or visit their website at [www.digitalstorageinc.com](http://www.digitalstorageinc.com).

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