

Customer Story:

Midwest Financial Institution Eliminates Workflow Logjams

This mid-sized midwest financial institution processes over 20,000 documents a month. Augmenting their MFP with dedicated fi Series scanners and Ricoh software significantly reduced labor and costs, and increased employee satisfaction.



Stuck in Line for the Multifunction Printer

When we met Rick at OpenText 2022, the conversation wasn't about scanners.

"Every time it goes through the roller, you know, it wears the roller," said Rick, a business systems analyst who manages the print, scan, and fax environments at a midwest banking institution.

The analyst stopped to speak with our sales team about software, but it became clear that the hardware they used was not supporting their heavy daily workloads.

MFP breakdowns and jams were commonplace in their multi-location bank, due in part to the degree of usage.

For years, the business had been relying on a multifunction printer to support its scanning needs.

But the hefty machine, while durable for printing large loads, wasn't always reliable, causing printing and scanning logjams—and longer waits.

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The business scans an estimated 22,000 sheets per month. The loss of time in waiting to scan documents and added maintenance costs became apparent in the first conversation.

How to Solve Document Workflow Delays

Like many professionals, mortgage associates were busy with multiple tasks, and completing a loan document workflow could take up to an hour, with multiple steps and frequent delays.

Unfortunately, the bank's workflow lag is all too common. In a 2023 Gartner poll, 38% of participants blamed internal processes, which includes workflow friction, as a block to digital transformation.

The financial institution concluded that an MFP wasn't meeting their needs. While it was a good one, Rick said, if it broke down, it impacted their workflow and day. "We started looking at that," he said.

The organization began with the idea that dedicated scanners could solve their workflow hold-ups, and tested this with just one in their larger location.

They opted for the fi-7300NX desktop scanner. The fast, compact Wi-fi scanner helps reduce IT costs with preconfigured user rights and authentications, as well as PC-less connectivity.

"They loved it," said the analyst. The bank quickly purchased seven more scanners as dedicated desktop scanners.

Benefits

From One-Hour to 30-Second Workflows

Word spread fast about the upgrade. "One of the gentlemen at the facility said it saves him about an hour a day," says Rick.

The bank placed fi-7300NX scanners in each of their seven mortgage departments, where loan packets for a single customer can be bulky to manage, process, and store.



"So both time savings and cost savings have been huge."

— **Rick**, business systems analyst for the midwest bank.

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Associates were immediately happy with the significant improvements in processing time, performance, and image clarity.

Eye-Catching Image Clarity, Seamless Scanning

The long-time analyst commended the Ricoh fi-7300NX scanner's reliability. They now can scan stacks of 40-55 small, heavy stock cards (A7 cards) seamlessly fast, and with better image clarity.

Recipients also relay that the quality is much better. "Sometimes it was fuzzy. They said that the clarity is much better than the MFP," Rick noted.

Preconfiguration and Easy Set-up

The busy bank needed a scanner for finance docs that would be easy for non-technical professionals to use right away.

Likewise, departments and individuals have differing administration rights and workflows that require authentication parameters. The organization also purchased Easy NX Connect, a Ricoh software license that includes NFC authentication and multiple connectors, all in one package.

Our sales engineer delivered each scanner preconfigured, customized for user workflows and authentications. Now, associates access their authenticated destinations with a few touch screen steps.

The fi-7300NX offers versatile authentication options, includes an embedded NFC reader (near frequency card), and is network-enabled.

The bank now also scans without their PCs, saving multiple steps and labor costs.

Upgrading with the Ricoh fi Series Scanner

"It would take (an associate) about an hour on an MFP... We were scanning mixed-sized checks, receipts, and different sized paper. You would have to make copies of this, and through the scanner...then wait in line."

After implementing the solution:

"It took less than 30 seconds to scan everything."

PFU America, Inc. offers post-purchase service that includes:

- Preconfiguration
- Customized naming convention guidance
- Ongoing sales engineer support for implementation

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"We're going to set up what they can scan to...different network drives because that's where you really see more savings," says Rick.

Technology That Supports Compliance

Notably, the organization's scanner upgrade supports more secure transmissions.

The fi-7300NX is designed with volatile memory technology. There is no hard drive on the scanner. If data were breached, memory is flushed, so information is unlikely to be compromised.

In the next phase of implementation, Rick and the organization are continuing to streamline workflows with the network and cloud-enabled scanner. They'll now be able to direct digitization to their OneDrive, breaking up silos and saving more steps.

The organization also plans to look at customer-facing scanners after they've completed internal upgrades.

"I tell you, people love them," affirms Rick. "They're just so much faster and easier to use," he says.

Since implementing dedicated fi-7300NX scanners, the banking institution completely eliminated frustrating processes, increased reliability and speed, and gained better image clarity.

Recommended Scanner for Easier Scaling

Network and Cloud
Enabled, PC-less



fi-7300NX

- Up to 60-pages a minute scan speeds
- Easy touch-screen operation
- Federal compliance - TAA | EPEAT silver rated
- EdgeXperience and NXManager optional server management software

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