

Westfield Bank

Bank pummels paper problems to increase service and accuracy while decreasing cycle times

“OnBase lets our front end staff focus on customer service. Even if it gives them just a few extra minutes with a customer, that’s more time they are getting to know the customers and cross-selling.”

– Andrew Weibel, Assistant Vice President
Information Systems, Westfield Bank

The Challenges

- Long wait times decreased customer satisfaction
- Multiple audits took staff away from their regular responsibilities
- Centralized scanning increased process times and accuracy

The Results

- Increases teller – customer interaction and sales opportunities
- Eliminates prep time for audits and provides auditor self-service
- Increases document indexing accuracy to speed processes

The Customer

Battered, bruised and beaten, banks across the country and around the world continue to look for ways to fight their way back from the economic downturn. Westfield Bank in Springfield, Mass., is no different. Banking on superior customer service and solid financials, Westfield and its 11 branches are pushing forward into a more positive era.

The Challenges

Even before the economy tanked, Westfield Bank leaders looked for ways to improve operations. Across the bank, managers tracked process problems and slowdowns to one source: paper. Data was safe and accessible in its core system, but related documents were paper-based. As a result, processes were slow, customer wait times were high and employees took time away from their regular responsibilities to chase paper.

The Journey

Westfield Bank used existing software to store some of its mainframe reports on laser disks. When that vendor stopped supporting its product, Westfield leaders knew it was time to find a better solution. Although bank executives wanted to start its enterprise content management (ECM) solution small, they also wanted to grow it as needed.

The Solution

“OnBase stood out because of its versatility,” says Andrew Weibel, Assistant Vice President of Information Systems. “We started small, but now are fully spread across the bank. A lot of other vendors wanted us to buy more than we were ready for.”

Bank starts with service, eliminates 30+ minute waits for customers

Before OnBase, sometimes customers would go into a branch but didn’t have identification like a driver’s license or signature card to support a transaction. In order to complete their request, tellers would have to call the bank’s main office and wait for someone in operations to fish out the copy of the original document and fax it back.

“A customer had to wait at least 30 minutes when tellers had to contact the main office for a document,” says Weibel. “Now, tellers access OnBase on the web and verify the customer in seconds. They don’t even notice any extra delay.” This faster service not only keeps customers happy, but it also gives Westfield Bank a competitive edge.

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System takes the time and worry out of audits

Now more than ever, banks are facing increased scrutiny from all angles. Often, this comes in the form of accounting and records audits to make sure the bank is following proper procedures. For Westfield, every audit meant hours – sometimes days – of prep time. Each audit required at least one employee to spend a day (on average) in the basement file room searching for records and documents the auditors requested. The process could be further delayed and the researcher further frustrated if one of the files was misplaced, misfiled or just on someone’s desk.

Now, there’s virtually no prep time required and no dusty files to search through. Instead, with all documents and records electronic, Westfield simply gives auditors limited access to OnBase. The auditors search for and find what they need themselves.

De-centralized scanning increases accuracy, decreases wait times

Before OnBase, Westfield Bank tried to centralize document scanning so that only one group of people scanned all documents from all locations. Scanning technicians knew how to prepare documents and troubleshoot scanners, but they didn’t know the story of the documents they scanned. This sometimes made document indexing less accurate, which trickled down to longer wait times for customers and employees.

Now, the people who know the most about the documents scan and index them. In fact, sometimes no one needs to index them. Automated Indexing from OnBase does the work instead. With less work to do before and after a document is scanned, Westfield is working to standardize as many forms as possible. All of this adds up to faster processing and faster processes, which keeps costs low and service high.

Why OnBase?

We’ve been improving processes for banks and financial services organizations since 1991. We know the challenges and opportunities you face and what it takes to conquer and take advantage of both. Whether your bank wants to start small and improve a single process or take on multiple issues, OnBase can meet your needs to give you the competitive advantage today’s market demands.

- Increases teller – customer interaction to improve service and sales opportunities
- Eliminates prep time for audits and provides auditor self-service
- Increases document indexing accuracy to speed processes and improve customer service

time to make a difference.

Get more information out of existing business applications. Reduce, even eliminate, wasteful, redundant tasks. Now you can spend your time on the things that really matter. That’s effective document and process management.

That’s the OnBase difference.

Learn more at Hyland.com/Financial Services



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