Streamlining Business and Satisfying Customers Via Digitization and Automation

Case Study Facts:

CLIENT: Real Property Management Vancouver

DIGITECH SYSTEMS RESELLER:

DocuDriven

PROBLEM: Paper-based contracts slowed responsiveness to customer needs

SOLUTION: ImageSilo®, PaperVision® Enterprise WorkFlow, PaperVision® E-Forms, PaperVision® Capture

RECOGNIZED BENEFIT: RPMV provides contracts in electronic format for online completion and e-signatures resulting in improved customer satisfaction and internal efficiencies

When Bob Butterfield purchased Real Property Management Vancouver in 2017, he was excited by the potential of the business. On his first day in the office, however, he quickly saw the limitations of their paper-based processes and knew it had to change.

After implementing the cloud-based content management service, ImageSilo, the company has recognized a substantial improvement in their ability to interact effectively with owners and renters.

The Situation

Real Property Management (RPMV) is a full service property management company serving both residential and commercial properties in the Vancouver, WA area. They manage the listings for rental properties, vet potential tenants, and negotiate leases for property owners. In 2017, they had 115 properties and 4 Home Owners Associations (HOA) under management.

Key Benefits

- Reduced document retrieval times from 4 man hours to less than 5 minutes, saving $115,920 annually

- Converted owner setup to an entirely electronic process, reducing setup time from 3-4 hours to less than 30 minutes

- Enabled remote work overnight in response to stay-at-home orders during the COVID-19 pandemic

On Butterfield's first day in the office, some owners visited asking for their packet of documentation, which included the contracts for management of their properties, all of the rental agreements for each tenant who had occupied each property, and in some cases marketing, utilities, and maintenance information as well. Four employees in the office started the search for this information in their paper-based filing system. After the search continued for over an hour, they were forced to tell the owner they would need more time to compile the information and to request that they return to the offices in person again.

Like many property management companies, RPMV had relied on a paper-based filing system to manage all of their business documentation. Each of the 115 properties under management included an extensive collection of contracts and other documentation that was filed under owner, home, and tenant categories. These records occupied four filing cabinets that were four feet wide and 4-6 drawers each (between 134,000-201,000 pages of documentation).[1]

When a new owner relationship was established, RPMV printed the 9 different contracts and forms, and spent hours reviewing the information with each owner, who came to the offices to review page by page and sign each document. This process took 3-4 hours per owner packet.

When RPMV received a request for information, the search averaged 30-60 minutes and often involved all four employees, wasting 2-4 man-hours per request. "Everyone had individual ways of filing, so the nomenclature wasn't consistent. This created volumes of errors in the process and further complicated the search for information," explained Butterfield.

"It quickly became apparent that the system wasn't sustainable. I knew we could do things more efficiently by leveraging newer technologies and eliminating the archaic paper filing system," he said.

The Solution

Butterfield began searching for a digital records system that would improve document organization and enable employees to find records through a simple keyword search. Butterfield employed his two teenaged sons who spent their summer vacation scanning all of the documents contained in the paper files and indexing them with identifying keywords to make them easier to locate, using PaperVision Capture. "It only took one hour to get the boys trained," explained Butterfield. "They picked up the system very quickly and started running with it!"

RPMV worked with DocuDriven to implement the cloud-based information management service, ImageSilo. DocuDriven also helped RPMV to convert the nine owner contracts into electronic forms that could be emailed, completed, and signed electronically and to utilize the built-in process automation tool PaperVision Enterprise WorkFlow to automatically route records to owners, compile required paperwork into packets, and ensure everything gets reviewed and signed for retention. "The setup was seamless," said Butterfield. "We changed everything, but it didn't feel like it due to the responsiveness of DocuDriven and the flexibility of ImageSilo."

> *"Our customers and owners really appreciate ImageSilo. The most common compliments we get are that it's electronic, easy-to-access, and time-efficient. We love what it's done for our business!"*
>
> -Bob Butterfield,
> Owner & President

Recognized Benefits

As documents were digitized, RPMV realized they had records as old as eight years in their filing system, so one of the first tasks was to purge these older records and setup the system to maintain records for just the three years that were required.

The automatic workflow and e-forms have dramatically simplified and streamlined setup for new owner packets. Now RPMV emails new owners the links to complete all 9 forms online. When the forms have all been submitted, process automation alerts RPMV staff, so they can review to ensure everything is correct and complete. Butterfield signs the documents electronically and to comply with state regulations, sends them over to a Designated Broker for review. Overall this process has reduced owner setup from 3-4 hours to just 30 minutes.

RPMV has tripled in size in the last few years, growing to 335 properties under management, but during that time, they have not had to triple their staff. "All of our employees, ranging in age from their teens to their seventies, pick up the process very quickly. ImageSilo is simple to use and very easy to train." In fact, RPMV often works with DocuDriven to train people via webinar.

The biggest benefits, have been the "major efficiencies" gained through automating the setup process and quickly finding information to respond to requests. RPMV has reduced the time it takes to find records from 4 man hours to fewer than 5 minutes, "For us, the efficiencies just can't be beat," exclaimed Butterfield. Managing about 24 requests per day results in approximately $115,920 saved annually.

During the COVID-19 pandemic of 2020, RPMV was able to comply with state orders to stay at home. As a cloud-based service, ImageSilo naturally lends itself to remote access while maintaining high standards of security and compliance. "Business is operating at normal speed. It hasn't hindered our processes in any way to have people working remotely," explained Butterfield.

1 https://www.qls.com/hs-fs/hub/20846/file-13419556-pdf/docs/qls-how-much-paper-do-you-have.pdf

About DocuDriven

DocuDriven is a Business Process Optimization (BPO) company with an emphasis on data and document management that is based out of La Center, Washington. They specialize in smart products and convenient services that streamline your business, saving you time and money. They offer products and services locally, nationally, and internationally and specialize in document management, accounts payable automation, scanning and conversion services, consulting, programming, and secure document storage. Learn more at www.docudriven.com.