



# Customer Testimonial

## Document Management & Filing



*“ WorkPool is 'wunderbar'! It has made my job so much easier. ”*

**George Lewis**  
Manager Filing Department

### Administration

#### Why do you use WorkPool?

To manage and keep track of all of our files, such as financial statements, tax documents, etc. When people request files from us electronically, we scan out the physical files to them and deliver them. We also print and scan our own barcodes to make things easier to manage and automate actions.

#### Life before WorkPool?

We used paper to control and track the files. It was a very manual process. For example, to track a specific set of statements we had to ask the balance sheet typing department who then would have to go and search through a stack of statements to find it. Every time the statements moved it had to be written down so we knew where it was and who's had it. Now information is one click away. We can see who has a file and when it is due,. And we can go and ask people where a file that is checked out to them is.

Files and statements sometimes “disappeared” or rather, got stuck somewhere. There were several sticking points or bottlenecks, especially when the audit managers had to review something as it would go into a drawer or go missing. Now files don't disappear as WorkPool takes care of the logistics to coordinate the transfer of files between people. When someone ticks a task to say they are done, the next person can see the file is on its way. There are always two parties responsible for a file so you can always find it as you can see how the files flow. I like that the system tells you where the file is going to go next, or who it is going to go to before you tick it off. Even if I know where it should go, at least I can now see it. I have the experience, but not everyone knows what happens, when and why.

#### What were the implementation challenges?

At first it's like a baby; you scream and kick against it but then afterwards you see this thing actually works. And you wonder why we didn't do this a long time ago. In the beginning you complain, because you think it is going to be extra admin and ask why does it want to change my system and the way I have worked for 20 years?. But now we are so in the groove and used to it – it makes life so much easier even though you don't think so in the beginning.

Our biggest challenge was the initial barcoding. We had a lot of files to barcode and we had to put in extra time to get it done. The other departments helped us though. I don't think there was a better or easier way to do it, we just had to get it done.

*Continued ...*

## What were the implementation challenges? (continued)

Obviously we still have to deal with people and the way they work. People were in the habit of dealing with files in a certain way and one clerk would teach the next clerk their bad habits. Sometimes people still try to take a chance or forget, but we have to say no, or tell them to book it on the computer first. If they don't request it electronically they get nothing. And if they try to bring something back that isn't updated on the system, we don't take it. That was the instruction from the top and how it works. The filing room is now locked so people can't just take files or drop them off. People still walk around with files and, in a busy office, they can forget it somewhere or misplace it and tomorrow they don't know where it is. Now I tell them that it's booked out against their name so I want it back from them. No more finger pointing. Even if they do lose it at least we can find it because we can trace it back on WorkPool.

## How has WorkPool changed the way you work?

As a company we used to have a lot of paper, we still do, but we have reduced our files significantly as people got used to working with them electronically. We mainly keep the tax files at the moment, but that will also be electronic soon. We are transforming from a filing department to a scanning department, which is our next challenge. We were also able to extend our services and pass on our skills and experience with the way we work with WorkPool to other departments. For example, we now print barcodes for the secretarial department so they can track their files too. They basically do the same as we do now to control all their source documents.

People no longer need to hold on to files. They can rather give it back to us and request it again when needed. A client could take 3 to 6 months to get back to us. Now the file does not have to stay with the clerk anymore during this time.

People make mistakes all the time when they have to coordinate the statements and paperwork that need to be sent out. With WorkPool we can coordinate and fix things before they are sent out to the client. . This eliminates our need to explain why we made a mistake and then redo the work.

## What benefits did you derive through this process?

We are saving a lot of money on expensive office space. Apart from having less files we also have a system that moves older files off site to cheaper storage and can keep track of where it is. We scan them from the filing room and move them in bulk to another location. Our filing department has shrunk and will shrink again.

We are a lot more efficient now. The scanning is quick and easy. We have one handheld scanner and a standing scanner. We can also see all incoming requests on the system as well as files that we expect to be back which means we can follow up. We used to waste a lot of time in the past just looking for files. Because of the "sticking points" sometimes the girl who types the documents would spend half her day chasing down files and asking people where they are. Now that doesn't happen. She can sit at her desk and see where it is and go directly to the person who's got it.

We send out and keep track of the final original statements. So if a client phones wanting to know where their statements are, the clerk, manager or anyone else can now see where it is on the system and they don't have to ask us. It means we provide a better and more professional service.

## Would you recommend WorkPool?

WorkPool is "wunderbar"! We had to fight and moan and search all the time in the past and do things manually. Now I know there is a better way and people can't argue. It has made my job so much easier. In the first month it is hectic, but in the long run it pays off.

