

Dispatcher
Phoenix
Use Case
15

Credit Union Association in Canada = Finance Services = <Project 2>

CUSTOMER PROFILE

- Trade association and service provider for Credit Unions in city M in Canada, jointly owned by those Credit Unions financed through assessments and fee income derived through its operations

KM SALES

- BCA Direct Sales

CUSTOMER NEEDS

Our second project came shortly after we implemented the communication to Credit Union Process. Side note -the agreed direction from CIO to KM for 2020 was to implement 4 RPI projects in the calendar year. End users seeing the results of the first solution identified a similar workflow and engage us to replicate our solution. This second process is for Tax Slips. Timeline to implement was short, the fact that we could "ride" on the previous design theory was an advantage.

SOLUTIONS

- > Dispatcher Phoenix Finance Package with Release2Me for 10 bizhub MFPs
- Create a new workflow within DP that takes individual PDF docs (already split and encrypted) from a folder, then emails out to ~140 credit unions from a list (same list from the Communications workflow we created) with fields for up to 4 email addresses (can be cc's).

KEY SUCCESS FACTORS

The most unique part here was that the client made their request to us on May 28th and needed this automation ready for June 2nd. Not something we would normally say yes to, but we had an SA who could help.

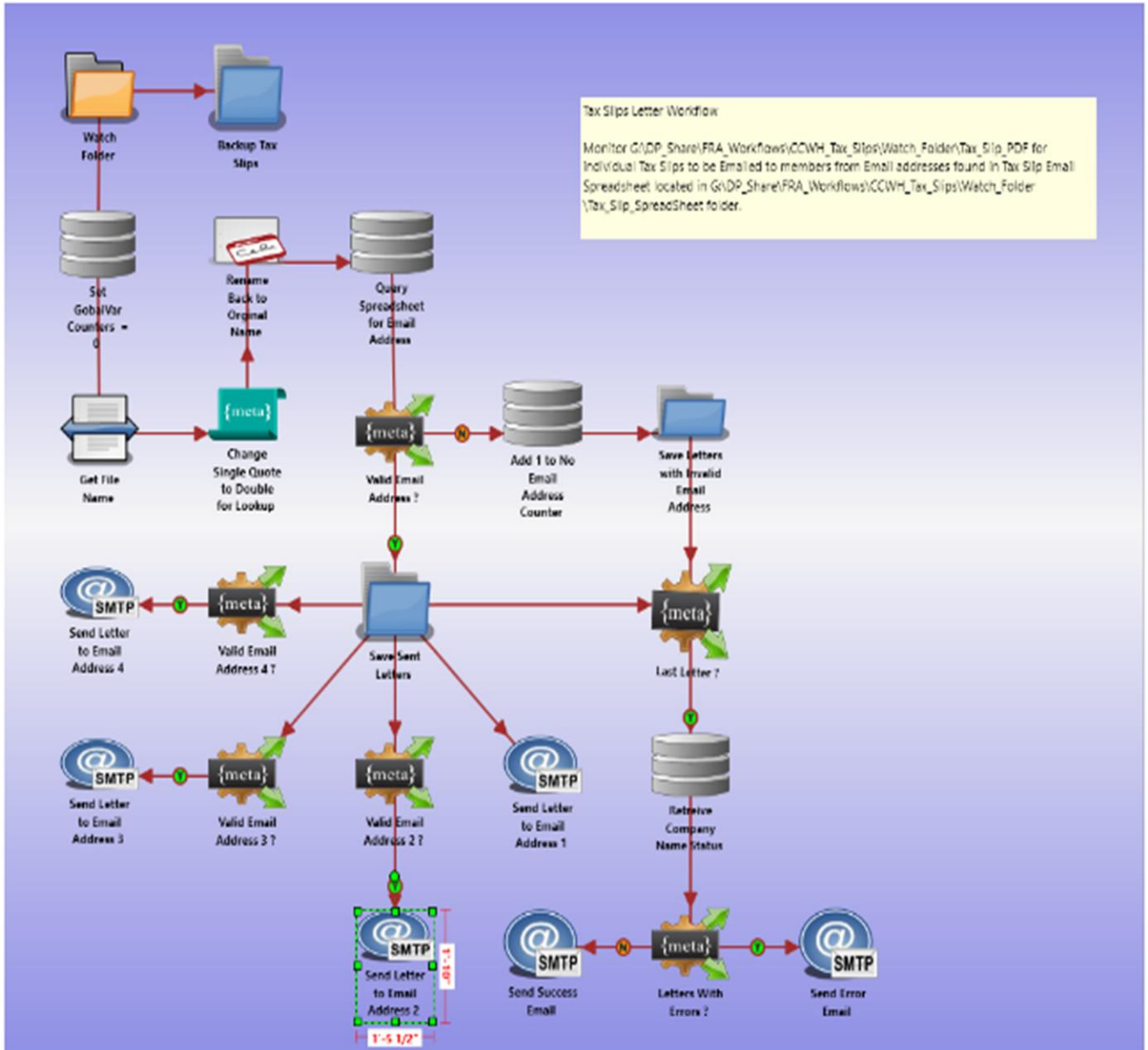
Quote from customer - our success depended on replicating the first solution and delivering tangible process time savings.

“Thanks everyone for all your help with setting up the workflow in such a short timeframe, much appreciated!!”

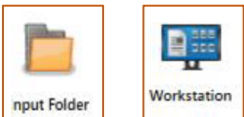
The process took 4 minutes. 135 letters sent, 6 were sent physically in the mail for various reasons (error on purpose) and 1 sent manually.

ADDITIONAL INFORMATION

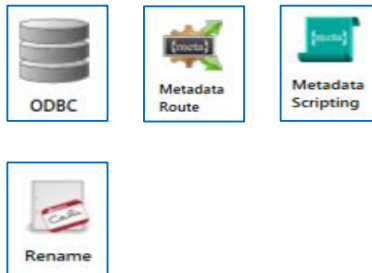
➤ Deployed workflow as illustrated below:



CAPTURE



PROCESS



DISTRIBUTION

