



Case Study

Mortgage lender implements cost-saving scanning solution

Workflow based on **Kodak** Scanners and Software provides a rapid return on investment (ROI)

Based in Redlands, CA, Mountain West Financial, Inc. is a full-service, privately held mortgage banker that processes thousands of pages of loan-related paperwork every day. They rely on a solution featuring **Kodak** Scanners and **Kodak** Capture Pro Software to simplify and accelerate their loan processing workflow.

Situation

Mountain West Financial used a labor-intensive process to sort, index, and scan over 12,000 documents each day and store them in individual loan files.

Objective

Streamline the imaging process by reducing the time and effort spent sorting and barcoding documents in preparation for scanning.

Solution

Combination of **Kodak** Capture Pro Software and **Ephesoft** Mailroom Automation Software, along with two **Kodak Ngenuity** 9125 Scanners, a **Kodak** i1420 Scanner, and a **Trüper** 3600 Scanner, all backed by Service and Support from Kodak Alaris.*

Results

By significantly increasing productivity, the new solution has led to a labor reduction of 66% and will pay for itself in only six months.

With paperwork for each loan running between 500 and 1,000 pages, the Mountain West Financial team was drowning in paperwork. Their existing process, which involved manually sorting all documents in-house, was especially labor intensive. Some documents had barcodes, but many didn't – which meant staff had to identify over 225 different document types, affix their own labels, and then index and stack the documents.

Susan Hartsock, Information Technology Coordinator for Mountain West Financial, knew there had to be a better way. "We were looking for a capture solution that would automatically identify documents instead of us having to do it manually," Hartsock explains. "We wanted to streamline the whole process."

The right components create a smarter solution

After experimenting with two other solutions, Mountain West Financial found the ideal combination of **Kodak** Scanners, **Kodak** Capture Pro Software, and **Ephesoft** Mailroom Automation Software. The firm is currently using two **Kodak Ngenuity** 9125 Scanners, a **Kodak** i1420 Scanner, and a **Trüper** 3600 Scanner, all backed by Service and Support from Kodak Alaris – of which Hartsock was already a fan. "Whenever I call, a live person answers the phone and I get help right away," she says.

“We’re saving time, labor, money – and even trees, since we don’t have to put labels on every document now. The solution is very intuitive and our end users love it because it’s fast and reliable.”

Susan Hartsock, Information Technology Coordinator, Mountain West Financial, Inc.

Fast, easy installation and implementation

The solution got off to a smooth start. “The setup and configuration were straightforward, and **Kodak Capture Pro Software** was very easy to integrate,” says Steve MacWilliams, Senior Vice President of DocuSource, the Kodak Alaris Authorized Reseller who recommended the solution. “It’s very well-engineered and works with a variety of scanners.”

Hartsock agrees: “With our previous solution, it took between four and seven hours to install a workstation. With our solution from Kodak Alaris, it takes about five minutes!”

The schedule for setting up the software was also accelerated. The original setup of 169 document types took less than one day. And Hartsock now finds it easy to create new document types herself, which is important in a business where the forms change constantly.

Performance that drives productivity

Mountain West Financial is extremely pleased with the performance of their solution. So far, the scanners have been problem-free, and the staff has found **Kodak Capture Pro Software** very easy to use. Scanner operators are reporting up to 95% accuracy, and Perfect Page technology from Kodak Alaris minimizes the need for rescanning and manual document improvements. What’s



more, greater efficiency has allowed the company to reduce the need for labor by 66%.

“The combination of **Kodak** and **Ephesoft** made for a perfect symphony of products. By using **Kodak** Scanners and Software to identify those documents with barcodes and only pushing unknown documents to **Ephesoft**, we were able to get two things done for the price of one: minimizing the use of the OCR server engine, while maximizing the scanner’s capture software,” explains MacWilliams. “Other capture solutions push all documents to a single server where they are processed serially, while ours is a parallel solution, which is very cost effective.”

Mountain West expects to see a ROI for the entire solution within six months.

“The ROI potential was compelling to Mountain West because of both the reduced annual maintenance of other software products and the significant reduction in staff time and labor,” MacWilliams concludes.

Building on those improvements, Hartsock’s long-term goal is to create a completely digital process. “This solution has been a sea change for us,” she says. “We’re moving toward a paperless workflow, and we’ve opened doors for scanning on the front end. It’s all very, very positive.”

Want to learn more?

Call: 1-800-944-6171

www.kodakalaris.com/go/IM

Kodak Alaris Inc.

2400 Mt. Read Blvd., Rochester, NY 14615 USA
1-800-944-6171

Kodak Alaris Operations Canada Inc.

Mississauga, Ontario, Canada L5W 0A5
1-800-944-6171

*At the time of purchase these were **Böwe Bell + Howell Ngenuity and Trüper** Scanners, now under the **Kodak** Brand of document scanners. The **Kodak i1420** Scanner has been replaced by the **Kodak i3200/i3400** Scanners.

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TM/MC/MR: Ngenuity, Trüper
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