



The Less Paper Strategy

Streamline operations with automated forms management

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► How much do you spend annually on paper-based business forms? How often do you reprint and re-create obsolete forms and update new documents? How can you get a handle on this cumbersome task *and* streamline processes?

According to Joe Klenke, senior manager, industry marketing, at Dayton, Ohio-based Standard Register, the answer is to organize, manage, and migrate documents through its Less Paper Strategy™. “Taking

Organize, manage, and migrate are the three steps of document management.

inventory and looking at how you use forms is the first step in streamlining processes and in document management,” says Klenke.

No matter what the form—membership applications, starter kits, mortgage documents, employment applications, vacation request forms—Standard Register provides the solution to using, processing, and effectively managing credit union documents.

As part of its document management strategy, Standard Register employs three basic steps to help credit unions gain control over business documents.

The first step is to *organize*. This means literally taking stock of all the forms your credit union uses and determining exactly what forms you use and how they’re used. Through this process you can establish a comprehensive database that will help you identify documents for process improvements or even migration to electronic forms.

The second step is to implement a system for ongoing document management. Although *manage* means different things to different organizations, all credit unions need a system to cost-effectively control and manage the printing, storage, and distribution of forms. This may take the form of implementing on-demand printing solutions or just-in-time inventory control and warehousing.

Once you’ve organized or implemented an effective document management system, you’re ready to *migrate* from paper to electronic-based documents for which there are many options. You can generate an electronic document management li-

brary, provide forms electronically via the Web, or create intelligent forms for online completion, submission, and routing.

Each step of the Less Paper Strategy increases efficiency and streamlines workflow processes. Standard Register has successfully employed its Less Paper Strategy throughout the country and within many credit unions, including Indiana Members Credit Union in Indianapolis.

The \$520 million asset credit union recently examined its processes to identify ways to improve service, reduce costs, free up space, and reduce the constant flow of paper. With 22 branches serving more than 90,000 members, the credit union discovered information was being duplicated in its core computer system and other applications when creating service request forms, loan notes, supporting loan documents, and negotiable instruments. Preprinted forms filled shelves in storage closets at every branch, especially check stock, which had to be secured in vaults, says Deidra Dunagin, vice president of information systems.

Indiana Members turned to Standard Register to convert its paper forms and preprinted checks to on-

demand, laser-printed documents. “We store mountains of forms and reports electronically and then combine both forms and information to create any type of clean, legible document on one shared device at each location,” Dunagin notes.

As a result of Standard Register’s Less Paper Strategy, the credit union is maximizing efficiency and eliminating paperwork, especially among tasks involving the creation, filing, and retrieval of documents. “It used to take 24 hours to deliver documents between branches via courier,” Dunagin says. “Now, documents are sent electronically at no cost via the computer network and printed on the new laser printers at each branch.”

“The soft-dollar savings and the increased efficiency are incredible, not to mention that your attentions are focused on members—not on filling out and managing forms,” Klenke adds.

To learn how to implement The Less Paper Strategy, call CUNA’s customer service department at 800-356-8010, press 3, and request Stock No. 22432-EE1. Or, call Standard Register at 800-755-6405 or visit www.standardregister.com. ■