

Customer Success Story

Document Management & Scanning



CUSTOMER:

**Chippewa Valley
Electric
Cooperative**

Cornell, WI

BUSINESS PROFILE:

Providing reliable and economically priced electricity to the rural areas, Chippewa Valley Electric Cooperative serves much of Chippewa County and small parts of Rusk, Taylor, Dunn, and Barron Counties. They have approximately 7,500 accounts and 22 employees.

“Moving all our documents to searchable electronic files was a big change. Through it all EO Johnson was perfect – they walked us through the process doing everything they could do to ensure it was smooth and complete. Now everything is at my finger-tips. As long as I have a computer and access to our VPN I can work from anywhere.”

— Dean Ortmann, Office Manager – Chippewa Valley Electric Cooperative

The Challenge

Chippewa Valley Electric Cooperative had a number of compelling reasons to move forward with a Document Management system. First, they were moving to a new facility and would no longer have storage space for old documents. Second, they submit a lot of reports to the government, and the government works electronically. And third, they needed a comprehensive way to scan and manage their documents.

The cooperative had started scanning documents themselves, but found the project outpacing what they were able to manage. Between the sheer volume of documents they had and the many different types of documents they dealt with, they knew they needed an effective way to manage their files as well as help with scanning their old records.



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Customer Success Story: Chippewa Valley Electric Cooperative Document Management & Scanning

The Solution

With a sizeable amount of records previously scanned, the new document management system needed to migrate existing documents into it as well as scan all new documents. In developing the structure for the system EO Johnson spent time with employees, learning how they searched for documents, what documents were most commonly needed, and how documents could be categorized.

“At any given moment we could have people looking for documents in a number of ways – we may need a member file, need to track down a work order, or understand an easement,” said Dean Ortmann, Office Manager – Chippewa Valley

Electric Cooperative. “When we need a record, we typically need it now, so the structure of our system had to be easy and intuitive to understand.”

An important consideration was the amount of old documents the Cooperative had that needed to be scanned. With only 10 office based employees, the Cooperative looked to EO Johnson’s document scanning group to properly scan their old files into their document management system. It was at times tedious work – with many small documents and some stapled to other documents the scanning team had to examine every document and separate them if necessary.

The Results

“EO Johnson was wonderful to work with,” Ortmann said. “They were very competent. If the person we were working with didn’t have the answer to a question, they got the right person from their company involved.”

Employees appreciate the convenience of having documents scanned and available electronically. They can enlarge the smaller documents on their

computer screens and no longer have to separate stapled documents. Multiple people can access the same file at the same time others are, and employees no longer have to walk to and from file cabinets. “I hardly go to the safe now for documents,” Ortmann said. “Because everything is scanned I can stay at my desk and retrieve documents by clicking my mouse.”



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Customer Success Story

Document Management



“My favorite part about working with EO Johnson is the attention they give to us as customers. They give us their focused attention and are ready to help us with questions we have throughout the process.”

— Linzi Mills, Accounts Payable Supervisor
Dahl Automotive

CUSTOMER:

Dahl Automotive

La Crosse, WI

BUSINESS PROFILE:

Dahl Automotive offers a full range of automotive services – from dealerships to a full service body shop and detail offerings in Wisconsin and Minnesota.

Originally founded in 1911, Dahl Automotive is one of the oldest Ford dealerships in the United States and has expanded to five dealership locations and 350 employees.

The Challenge

Paper workflow and document management evolved into an issue for Dahl Automotive. Since large volumes of paper circulated through the department, there was a sense of chaos with organizing the documents. “There was a sense of chaos trying to manage the paper trail for our Accounts Payable Department,” said Linzi Mills, Accounts Payable Supervisor at Dahl Automotive.

Another issue was in the logistics of the paper movement. Often, papers went to and from different locations making document management hard to track.

To amplify the problem, storage of the paper documents was also a concern as the dealer ran out of space storing hard copy documents. “We knew from the logistical issues that we needed to look for a way to reduce paper hardcopies and increase organization for our accounts payable,” said Mills.



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Customer Success Story: Dahl Automotive

Document Management

The Solution

After working with EO Johnson on multifunction devices, the company leadership mentioned their desire to also have a document management software as well. Shortly after, a conversation began between the accounts payable department and EO Johnson's Document Management team.

Throughout the process, Mills appreciated how hands on and involved EO Johnson Representative were with the software implementation. "They

really took the time to understand our current workflow and what my day-to-day looked like," Mills said.

The experience of working with EO Johnson's representatives made the process simple and organized. "The representatives we worked with were extremely knowledgeable and easygoing," Mills continued, "I trusted that the project was going to go smoothly."

The Results

It didn't take long for Dahl to realize the benefits of their implementation. Soon after the software implementation, Mills was able to see a difference in the accounts payable process. "Decreasing paper intensive processes increased our overall document organization and decreased time spent tracking paper workflow," Mills said.

Even after implementation, EO Johnson representatives stayed closely in tune to the needs of Dahl Automotive. "EO Johnson's Document Management team continues to ensure the

solution we have fits our business in addition to making suggestions for software that would mesh well with our company."

The team of people and support EO Johnson representatives were able to give were one of Mills' favorite parts about working with the company. "When we work with EO Johnson, the people we interact listen to us and make us feel like they care about our business and success. The attention and service we receive is second to none."



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Customer Success Story

Document Management



“It was surprising how quickly our new document management system with EO Johnson was designed and put into place. EO Johnson set up the system exactly how we wanted, and getting the information we are looking for is quick and easy.”

— Brittany Vest, Medical Records/Prior Authorizations – ENT Associates

CUSTOMER:

ENT Associates

Wausau, WI

BUSINESS PROFILE:

ENT Associates of N.C. Wisconsin provides ENT (Ear, Nose, and Throat) and Allergy/Immunology/Asthma services, providing a full spectrum of care in the diagnosis and treatment of disorders related to ENT and allergy/immunology. Additionally, their audiologists provide full diagnostic and treatment services for hearing loss. With their main office in Wausau, WI, they have eight additional satellite clinics.

The Challenge

ENT Associates of N.C. Wisconsin had a document management system in place that presented challenges. The office generates and deals with specialized documents, and their document management system could scan and electronically store only part of their records in the way the staff needed them.

“The way the system could store our specific documents didn’t work for us,” said Brittany Vest, Medical Records/Prior Authorizations – ENT Associates. “We wanted all our records in an electronic format. The lack of flexibility in our prior system prevented our office from being as efficient as we wanted it to be.”



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Customer Success Story: ENT Associates

Document Management

The Solution

ENT Associates wanted a document management vendor that could do it all – scan and store all their medical records and provide service and support. They looked at a number of vendors and selected EO Johnson Business Technologies as their document management partner.

The process of setting up their document management system took a couple of weeks and EO Johnson worked closely with ENT's administrative leader. "EO Johnson's approach was consultative," Vest said. "Their first step was to do

an assessment and learn how we do business. They took that information and built a conceptual demo for us to react to." Working together, ENT's team and EO Johnson made changes to the system so it would fully meet their needs.

ENT was already familiar with document management for some of their records, but the new system brought never-before scanned daily work into the electronic scanning process. Prior to this staff needed to search paper files to access these documents.

The Results

A handful of employees use the system on a daily basis and additional staff use it frequently. Vest enjoys the convenience of having all ENT's documents electronically stored. The system pulls information the way the office needs it pulled, and staff no longer have to dig through paper files for documents.

Due to exporting constraints with the prior vendor, ENT is using two electronic document systems. During the planning EO Johnson worked with ENT's

administrator to determine if they should make the commitment to export their information and have just one system. Collectively they determined the best way to move forward was to have two systems. "We are making it work," said Vest.

"Working with the EO Johnson team was a pleasure," Vest said. "They answered all questions, were very nice, and made us feel comfortable every step of the way."



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Customer Success Story

Document Scanning & Conversion



“Our business is words and words are paper. Moving paper files to an electronic format is a very serious and important project. From start to finish EO Johnson made that process seamless. I simply cannot say enough good things about how it is to work with them.”

— Rhonda Karau, Librarian/Records Manager, Ruder Ware

CUSTOMER:

Ruder Ware

Wausau, WI

BUSINESS PROFILE:

With over 40 attorneys and more than 90 years of experience in serving business owners and individuals, Ruder Ware has established itself as one of Wisconsin's largest and most successful law firms. The firm has offices in Wausau and Eau Claire, WI.

The Challenge

Prior to an office move in 2007, Ruder Ware's paper files were stored offsite in the basement of an historic Wausau, WI building. With the move to a new office the firm gained onsite storage space to store paper files. Based on the amount of paper attorneys produce, Rhonda Karau, Librarian/Records Manager, realized even the large space would be quickly filled with paper files and set about finding a solution for file digitization.

The uniqueness of legal client files presented immense challenges to scanning discussions. Files often contained a variety of paper sizes, and the actual structure of the file folders had variables – some contained additional legal size manila folders, paper could be stapled or clipped together, or bound together in a variety of other ways. How these files could systematically be taken apart and organized for electronic scanning, retrieval, and general use proved to be a daunting undertaking.



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Customer Success Story: Ruder Ware

Document Scanning & Conversion

The Solution

Though Karau and her team had arrived at the solution of digitizing files, she needed to create a business case for why the investment made sense. To say the process was intense is an understatement. Understandably, attorneys are significant consumers of paper. Digitizing records represents a culture shift meaning rallying support for print file digitization had to be sound and convincing. "Because our attorneys are more and more on the go, they wanted a way to securely access client files digitally in an easy-to-use format akin to a paper file," Karau said. "EO Johnson makes that possible even with the larger amount of paper we have."

With backing from their board, Ruder Ware moved forward with scanning print files and looked to

EO Johnson's document scanning team to do the project. "EO Johnson's scanning experts readily acknowledged our unique challenges and took no time to develop a scanning process that completely met our needs," Karau said. "They guided us through the entire process."

Ruder Ware's File Department picked the most relevant, recent transactions as the print files to be scanned first. This was done on purpose. "We knew our department would play a key role in bringing about the culture change. By picking the most recent files, we knew our staff would be accessing them the most. Our goal was to have an electronic file that looked exactly like the print file," Karau said.

The Results

Karau couldn't be more pleased with the results – 200 banker boxes have been scanned yielding 3,462 PDF documents with 421,783 images available in Ruder Ware's document management system. Equally important, those 200 banker boxes are no longer taking up document storage space at the firm.

"Moving 200 boxes off of our floors really opens up valuable square footage for better use," Karau said.

The firm plans to continue digitizing paper files. The next project is in their Eau Claire office where they will scan another 100 boxes.



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Customer Success Story

Document Management



“We are very pleased with our Document Management system. We are saving time and money and, by accessing information quicker, we are serving our Guests better.”

— Bill Schierl, Co-CEO
Team Schierl Companies

CUSTOMER:

**Team Schierl
Companies**

Stevens Point, WI

BUSINESS PROFILE:

Team Schierl Companies (TSC) operates retail service locations in central and northeast Wisconsin and Michigan's Upper Peninsula, as well as Schierl Tire and Service Centers, Subway and Cousins Subs restaurant franchises, Schierl Oil, a heating oil business, laundromat facilities, and a real estate development division. TSC has approximately 500 Associates and focuses on a structure of Associate Leadership instead of management.

The Challenge

Team Schierl Companies (TSC) knew they wanted a Document Management system for some time. They had been quoting systems on and off for about four years but each time ran into the challenge of finding the right software – identifying an affordable system that was scalable downward to meet their needs proved to be challenging.

Then TSC made a critical change, adding a storage area network that increased their data storage ability. With this major step forward, TSC decided to rebid their Document Management program. Coincidentally, it was also time for TSC to replace their printer/copier fleet, paving the way for the company to have the necessary equipment in place to support their Document Management system.



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Customer Success Story: Team Schierl Companies

Document Management

The Solution

A number of companies submitted Document Management proposals to TSC, and EO Johnson was selected. "EO Johnson came to us with options – they understood what we needed," said Bill Schierl, Co-CEO – TSC.

The Document Management analysis included a site visit and thorough study of machine count readings, workflow, and machine utilization. The best software for TSC's Document Management needs was identified as well as the appropriate equipment to both meet print/copy needs and

support Document Management scanning requirements.

The new equipment included two new printers in each of the seven retail facilities and seven new machines in the administrative facility. TSC also implemented a key software (Print Free) allowing them to modify their existing documents for different printers. Now, their retail facilities can print regulatory compliant documents that are scanable in the new Document Management system.

The Results

Document Management is working very well for TSC. Schierl sites three major benefits:

- **Time savings**

As soon as the documents are electronically scanned and stored they are available for retrieval. In the past, if a retail location needed a file they made a request to the administrative office and the file had to be physically pulled and sent to the requestor. Now the process is instantaneous and numerous users can access files simultaneously.

- **Cost savings**

The company has realized a monthly cost savings in paper of \$500.

- **Safe and accurate file storage**

Once properly indexed into the software important documents are safe from the risk of destruction and of being misfiled after being used.



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