Case Study
Document Management and Back-Office Time Study Improvement Project

P R O F I L E
Document Management and Back-Office Improvement Project

A US based Credit Union desired a 3rd party analysis of their document management and quality assurance processes assessment

O B J E C T I V E S
- Baseline current situation & provide recommendations to streamline operations increase efficiencies
- Collect time measurements for each activity: Processing, Operations, Document & Workflow, Quality Assurance (Auditing)

A P P R O A C H
The methodology utilized included time and motion studies, data collection, observe current processes, gain feedback from staff members, and time and motion study analysis.

R E S U L T S
Opportunities in the following areas were identified;
- Documented Best Practices
- 60% cost improvement
  - Identified opportunities to streamline and increase efficiency –
- 40% increase in efficiency
  - Quantified and provided improvements associated with: Processing, Operations, Document & Workflow, Quality Assurance (Auditing), Idle Time –

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