



trumpet

Trumpet Success Story

AUTO FILER FOR WORLDOX



Industry

Legal/Collections

Challenge

To take the pain out of reviewing, approving, mailing, filing and tracking collections letters

- + Reduce collections cycle times
- + Increase staff productivity
- + Reduce paper and filing footprint
- + Ensure process auditability

Solutions

A customized document workflow for Worldox was developed, which was integrated with outsourced mailing services. This automatically filed digital copies of mailed collections letters, and provided delivery status information and signed delivery receipts.

- + Routing/approval workflow (Trumpet Worldox customization)
- + Outsourced printing/ mailing with digital tracking of certified mail receipts
- + Automated filing of USPS mail receipts with original documents and client copy (Trumpet Auto Filer for Worldox software)

“The letters we send to members go out a lot faster now. A faster response time translates into more prompt payment and more money for our clients.” – Trumpet Client

Taking the Pain out of Collections Management

Collections Letters Go 100% Paperless

The Challenge

For a Texas-based legal firm who handled collections on behalf of their clients, mailing collections letters and managing all of the associated communications used to be a big problem. The firm’s team of ten paralegals routinely mailed out thousands of letters each month. The firm did so effectively, but it took a lot of time and effort—which is why they went looking for a more automated approach.

The firm dealt with a lot of paper, but the problem wasn’t just the paper, it was also the manual process that paperwork supported.

In the old days, workflow at the firm meant “walkflow;” each person who reviewed and approved collections documents had to walk to the filing cabinet. Moving documents through the approval process literally meant moving paper from one physical folder to another. Every step in the process was a physical step—one that took too much time and effort.

In 2014, the firm decided to remove time and distance from the collections equation. They understood that the faster they could communicate with debtors, the more success they would have collecting money for their clients.

The Solution

The collections firm’s first step in going paperless was to choose Worldox to manage all of their documents digitally. At the same time, they elected to automate/outsourced printing and mailing collections letters by relying on an online, outsourced mailing service.

To achieve true productivity from their new digital tools, however, the firm knew they needed to connect multiple steps in a 2-way process. This included filing, reviewing, approving and mailing the original documents, and then digitally filing the signed mail receipts and the recipient’s copy, along with the originals. Ultimately, the paralegals wanted to have all of the documents, an audit trail of internal approvals, plus shipping and receiving confirmation at their fingertips, instantly.

To put all the pieces together, the firm turned to Trumpet. As a Worldox partner and solutions integrator, Trumpet and its solutions team provided the right technical expertise and business know-how to map out the existing process and propose an automated alternative. The result would allow each stakeholder to handle their step in the process with minimal effort and without ever having to leave their desk.



Results

- + The new paperless internal process sends out over 4,000 collections letters per month.
- + Collections processing time has been reduced by 2-3 days.
- + Original documents, customer copies and certified mail receipts are automatically filed and tracked in Worldox for instant audibility.

Trumpet, Inc.

Forward-thinking and always focused on making life better for our clients, Trumpet has devoted nearly two decades to developing and implementing document management and workflow automation tools for the financial and legal markets.

If you need to simplify, streamline or automate a document-driven process in your organization, contact the Trumpet professional services team.

The Implementation

After meeting with the firm's staff, the Trumpet team designed an automated workflow and filing solution that streamlined and simplified routing, approving, mailing, tracking and filing collections documents.

The solution included:

- + Worldox customization to provide workflow routing for review, approval and printing/processing
- + Integration with online mailing services to deliver approved documents for printing/mailing/tracking
- + Implementation of Trumpet's Auto Filer software to simplify filing and indexing original documents, client copies and signed receiving documents

Trumpet's workflow solution allows paralegals to upload collections documents into Worldox and move them on to another paralegal for review. After review, rejected documents are returned to the originator's workspace in Worldox; approved documents are passed on to an attorney's workspace for approval.

Trumpet's solution allows paralegals to re-order approved documents so that they are properly sorted and organized prior to passing them along to the online mailing service. Documents to be processed for mailing and tracking are moved to a hot folder monitored by the mailing service.

Trumpet's integration ensures that a copy of the sent documents and the signed delivering receipts can be easily retrieved and stored back in Worldox, related to the original files.

Trumpet's Auto Filer for Worldox software makes the process of filing, indexing and associating files sent via the outsourced mailing service (plus related delivery receipt documents) simple and painless.

The Results

As a result, paralegals and attorneys have instant access to documents, status information, mailing and receipt confirmation. On average, collections letters are sent out 2-3 days sooner and paralegals are able to process 40-50 additional letters each month. Equally important, the entire staff can focus more on serving the collections needs of their clients and less on legwork.



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