



“Naviant boosts productivity on document conversion jobs by as much as 87 percent with the OPEX Falcon® document scanning workstation. Falcon is a one-step, drop feed scanning workstation that allows operators to scan a wide range of document sizes with minimal preparation.”

Greg Bank
Senior Account Executive, OPEX

Double-Digit Productivity Improvements

When it comes to mastering document and content management, few companies can match the expertise and experience of Verona, Wisconsin-based Naviant, Inc., an enterprise content management (ECM) solutions integrator and business process management (BPM) consulting specialist.

For the past 30 years, Naviant has empowered their clients to make better and faster decisions through simplifying business processes and implementing ECM solutions such as OnBase. Naviant expertise and focus is within government, insurance, commercial, and healthcare. As a full service ECM solutions integrator, Naviant has a Physical Records Division that supports their existing customer base in converting physical documents and microfilm/fiche to electronic form so it can be used within their OnBase system.

Naviant’s process-first approach has served its clients well. When the company had an opportunity to improve its document scanning processes using the Falcon document scanning workstation from OPEX Corporation, Naviant’s leadership immediately saw the potential for Naviant and their clients.

Since installing the Falcon, Naviant has seen productivity gains ranging from 35 to nearly 90 percent. These gains have been realized by eliminating the time-consuming document preparation that was necessary using their old document scanning system.

Improving Processes, One Client at a Time

Falcon is a one-step, drop-feed scanning workstation that allows operators to scan a wide range of document sizes with minimal preparation. For a company that handles a wide variety of document sizes and types for many clients, that adds up to significant gains in efficiency. Naviant first saw these potential benefits during an installation project with a mutual client.

In that case, a large government client needed to improve their document handling processes. The client was already using OPEX extractors to handle the client’s mail, but the client needed a more efficient way to manage their document scanning.

OPEX and Naviant discussed the possibility of presenting a unified solution to the client which would combine an OPEX Falcon scanner with the Hyland OnBase ECM software offered by Naviant.

What’s Good for the Goose...

Well, it turned out that the solution was so successful for the client that Naviant purchased a Falcon to use for its own conversion operations. “Because Falcon can handle multiple sizes of records at once, we understood the efficiency gains that were possible,” says Amy Larson, Manager at Naviant. And she was right.



“With the push of a button, we can convert the scanned folder into the preferred export file type, name according to the case number on the file. This way, the folder is only handled once instead of six to eight times we had to handle it previously.”

Jim Wilhelm
Conversion Services Supervisor, Naviant

“If we had a question, we got a response very quickly. We were very impressed with the service we’ve received.”

Amy Larson
Manager, Naviant

The Naviant team (left to right)
Amy Larson, Harry Gustafson,
Wendy Crockett, and Jim Wilhelm

Naviant began testing the Falcon on some large, in-house jobs it was running for clients. In one instance, the documents ranged from small checks to documents up to 8 inches by 25 inches. “Previously, we had to take those large documents to a separate large-format scanner and then merge the scans with the rest of the file,” Larson says. “With the Falcon, we were able to run everything at once. The productivity gains we saw were substantial.”

For that particular client, Falcon enabled an 87 percent improvement in productivity for a job that typically involves two to four boxes of 3,000 images each.

Those benefits have been seen by other similar projects. One recurring healthcare job involves scanning 30 to 60 boxes of documents that previously had to be prepared, scanned, evaluated for quality control, and indexed in several separate steps.

“Now the operator can pull the folder out of the box, run the documents through the scanner, and name the file as it’s being scanned,” says Jim Wilhelm, Conversion Services Supervisor at Naviant. “We can quickly delete the blanks and check for any documents that need to be rescanned. With the push of a button, we can convert the scanned folder into the preferred export file type, named according to the case number on the file. This way, the folder is only handled once instead of the six to eight times we had to handle it previously.”

By reducing those steps, Naviant was able to achieve a 55 percent productivity improvement for the client.



Ready, Set...Increase Productivity

Naviant is now completing projects faster and has improved utilization of its own internal resources so they can complete and bill even more work. Armed with those productivity metrics, they are able to do more business based on the speed, accuracy, and quality of their high-volume conversion projects.

Many of Naviant’s clients not only need day-forward digital scanning, but they also have large stores of back files that need to be converted. “We’ve found that the Falcon is an unbelievable tool for converting documents of different sizes and in varied conditions,” Larson says. “We no longer have to tape smaller documents to an 8.5 by 11 piece of paper before we scan. All of that prep time has been completely eliminated.”

Image quality has also improved because the Falcon provides higher-quality scans than their previous production scanners. “We’re not sacrificing image quality at all for the labor efficiencies gained through the Falcon,” Larson says.

According to Larson, their Falcon scanner was delivered and installed on time, and the OPEX training program helped Naviant get up and running with the solution quickly. “If we had a question, we got a response very quickly,” Larson says. “We were very impressed with the service we’ve received.”

"I can bring clients into our facility and show them the types of gains they can expect from the scanner. It provides instant credibility and allows them to see how they could establish similar metrics in their operations."

Harry Gustafson

Hardware Account Executive, Naviant

A Perfect Match

With a successful solution in place, OPEX and Naviant further cemented their partnership via a reseller agreement in February of 2015. Naviant now offers the Falcon alongside its ECM solutions for high-volume clients that will benefit from the reduction in document preparation work enabled by the OPEX scanners.

"Based on the success of the initial deployment in Wisconsin, we believed Naviant was an excellent candidate to join our Reseller Program," says Greg Bank, Senior Account Executive at OPEX. "We have a very active relationship, and we've engaged successfully on several other client opportunities."

Having the Falcon on-site has also helped Naviant's hardware business. "I can bring clients into our facility and show them the types of gains they can expect from the scanner. It provides instant credibility and allows them to see how they could establish similar metrics in their operations." says Harry Gustafson, Hardware Account Executive at Naviant.

Overall, the Falcon has improved Naviant's Physical Records Division's internal processes and provided a way to offer even more benefits for clients. "Having the OPEX scanners as part of our toolkit allows us to provide a robust solution that is efficient and cost-effective for our clients with large volumes of mixed documents," Larson concluded.

About Naviant Inc.

Business processes and solutions that empower better and faster decisions are what we do best. Our process-first approach brings focus to the importance of process improvement prior to implementing best-in-class solutions. As a nationally-recognized ECM solutions integrator and BPM consulting organization with over 30 years experience, our clients do more with less by streamlining processes and gaining visibility into the information they need to make better decisions. Naviant is a top-tier partner for OnBase by Hyland, Perceptive Capture, AnyDoc, and OPEX. *Process focus. Excellence.* Learn more at www.naviant.com.

About OPEX Corporation

OPEX Corporation at its core is all about optimizing business processes. As a recognized global technology leader in document imaging and high-speed mailroom automation since 1973, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organizations worldwide. Today, OPEX systems are installed in financial services, healthcare, government, non-profit, utility, service bureau, insurance, telecommunications and university/ educational marketplaces around the world. For more information, visit www.opex.com.

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