

Case Study

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Achieving a Seamless Transition to Digital Documents in Connection with a Corporate Relocation

"Ricoh did a great job working with us to develop a plan to image the tax documents in a manner that met our schedule and gave us a seamless transition to digital images in our new headquarters location."

—Program Director

ABOUT THE CUSTOMER

The customer is a global enterprise offering a number of technology and industrial solutions in several vertical markets. The enterprise is organized into operating units and group companies operating independently in the market.

CHALLENGE

The organization has a Synergies group that is charged with improving efficiencies by enhancing synergies across its operating units and group companies. The Synergies group determined that it would be advantageous to digitize documents from its tax department as part of a planned relocation of the company's corporate headquarters. The imaging project would reduce the need for storage space and the risk that documents would be lost, meet sustainability objectives and facilitate the company's document retention policy. With the impending move, the company needed an efficient way to accomplish the imaging of these sensitive documents under a tight deadline.

SOLUTION

Ricoh had partnered with the organization for more than ten years, providing multifunction products (MFPs) and print-related services, including break-fix and supplies for the company's fleet. Because of the long and trusted relationship, the Synergies group approached the Ricoh team to see if it could accomplish the imaging project.

"We had a very short deadline for imaging our tax documents as part of our relocation," said the Program Director for the company. "Many of the documents related to the active tax season, so we could not afford to have them unavailable during regular business hours." Working closely with the organization, the Ricoh team designed an efficient plan to transport the approximately 170,000 pages for imaging from the company's existing location to one of Ricoh's more than 40 U.S. document processing facilities, located in the city where the new headquarters would be established.

CHALLENGE

- Successfully transition to digital tax documents as part of a corporate relocation
- Meet a tight deadline without business interruptions

SOLUTION

- An efficient plan to transport and image documents
- Completing the project in a matter of days so documents were available for business users

RESULTS

- A seamless transition to digital tax documents
- No business interruptions

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Working 24/7 at the processing facility, the Ricoh team completed the imaging in a matter of days, which included a weekend. Ricoh delivered a load file ahead of schedule containing multi-page PDF images formatted for the company's document system and returned certain paper documents per the company's request.

"Moving to digital documents has the potential to deliver numerous efficiencies throughout our organization and furthers our sustainability goals," said the Program Director.

RESULTS

"Ricoh did a great job working with us to come up with a plan to image the tax documents in a manner that met our schedule and gave us a seamless transition to digital images in our new headquarters location," said the Program Director. "Now, we don't have to worry about documents getting lost. Additionally, we can easily search for them using several index parameters, including tax year, document type and taxing authority."

The search feature is also enhancing the company's ability to improve internal and external customer service by reducing the amount of time it takes to retrieve these documents. Storing the documents as digital images also simplifies retention policy compliance. "We can set documents to be removed from our system by date in accordance with our retention policy," the Program Director explained.

With the successful imaging project completed, the company's Synergies group is looking to repeat the process with other operating units and group companies within the organization. "Moving to digital documents has the potential to deliver numerous efficiencies throughout our organization and furthers our sustainability goals," said the Program Director. "The fact that Ricoh has processing facilities across the country with identical workflows and standards makes it the ideal partner to help us achieve our imaging goals."



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