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ECM Success Profile

NORMAN & COMPANY, INC.

Norman & Company Revs Up Its Document Management Transition With Konica Minolta Expertise

CHALLENGE: Jennifer Holcomb, the vice president of operations for Norman & Company, Inc. – a third-party administrator for automobile after-market products – will be the first to admit that her industry is slow to adapt to technological changes. Guilty of that itself, the company faced a daunting task of finding a more efficient and effective means of capturing and storing its growing volume of hard-copy documents that reached up to 15,000 per month.

Staffed with 29 total employees, the Oldsmar, Florida-based company is a family-owned business that oversees two proprietary products, Classic and ClassicTrak, which provide GAP protection and other ancillary items purchased at automobile dealerships. Norman &



ClassicTrak

Company expanded by adding a second location to relocate its Claims and Cancellation departments. This accommodated its thriving

business as continued growth was leading to an influx of additional paper contracts that needed processing. As the industry had not fully embraced e-contracting at that point, it seemed each addition of 1,000 contracts required another employee and more space, further impacting the company's financial growth.

"There's a great push to get all of our customers into e-contracting and we've been successful in getting some to transition over, but it's a very slow, uphill battle in the automobile business," Holcomb said. "As we kept signing more dealerships, we would have to keep adding staff and were running out of space. We were looking for a sophisticated solution that we could use while, at the same time, continue trying to convert more clients to go electronic."

Holcomb was looking for more than just capturing and labeling data; she needed effective extraction of critical data from their complex documents that contained a variety of data entry types, including check boxes, circles, free form, etc. The solution would also need to support documents of mixed sizes – primarily letter and legal size – and be cost-effective.

SOLUTION: To find her answer, Holcomb queried her peers in the industry while at trade shows and at other opportunities. Also, since the company already owned two Konica Minolta copiers, she asked her Konica Minolta representative, Devin Singh, who brought in his colleague, Stephen Nimon, an enterprise content management (ECM) consultant. Nimon offered up a number of software options, but felt that Ephesoft Smart Capture would provide a custom solution that would better satisfy Norman & Company's needs.

"Overall, we're very happy with our Konica Minolta relationship. Heather Brunelli and Dave Brennan were so personable and detail-oriented during the building phase. Stephen Nimon stood with us through the entire discovery phase as we were exploring Ephesoft, and its tech support representative, Debbie Hill, has been fantastic, providing us with excellent response time. She's brought to us a huge sigh of relief because she's helped make everything so easy for our staff."



Jennifer Holcomb
vice president of operations
Norman & Company, Inc.

NORMAN & COMPANY, INC.

“Ephesoft is recognized as one of the most comprehensive Intelligent Document Recognition (IDR) software solutions in the industry,” Nimon said. “It allows businesses to better classify documents by using content, bar code or layout analysis. Norman & Company had very complicated forms and I knew that Ephesoft’s Smart Capture could handle this heightened complexity.”

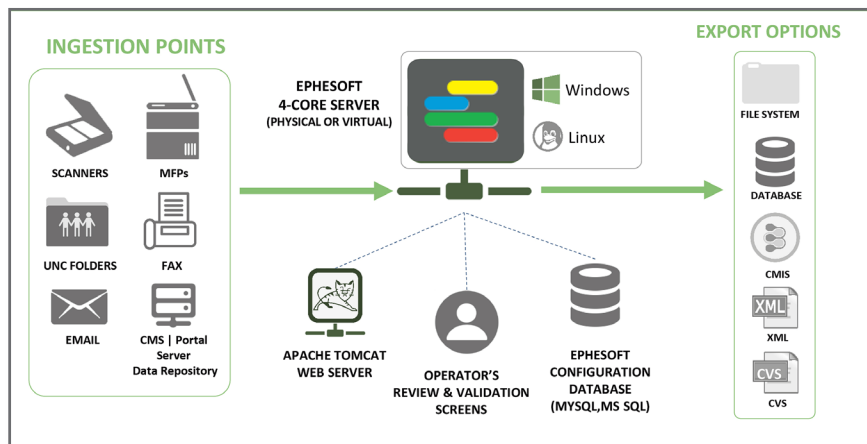
To help determine if that was true, Holcomb gave sample documents to Ephesoft, who flew in two representatives. They demonstrated the product and Holcomb checked references, conducting very in-depth interviews with actual users. Once satisfied, Norman & Company purchased Ephesoft in October 2015 and it was fully implemented by July 2016.

Overall, the installation went well with some tweaks necessary to realize smooth operation with its enterprise resource planning (ERP) system. Nimon noted that after additional enhancements are made regarding the company’s ERP system, Norman & Company will experience even greater savings.

NEXT STEPS: Holcomb noted that Norman & Company is looking to expand Ephesoft so that it can support a greater variety of contracts. The goal, she said, is to double the volume that is currently going through Ephesoft penetration. “We’re trying to persuade the automotive dealers we sign to go electronic, but many are small ‘mom and pop’ businesses. So we’re gently encouraging them to convert.”

TECHNOLOGY:

- Ephesoft Smart Capture



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