Penn Foster Career School

DocStar®

Nationally Accredited University Improves Workflow Processing and Customer Service With DocStar ECM

PENN FOSTER
CAREER SCHOOL

Company Facts

Overview

▶ Location: Scranton, Pennsylvania
▶ Industry: Education
▶ Number of Employees: 300
▶ Website: pennfoster.edu

Success Highlights

Challenges

▶ Inefficient document workflows
▶ Excessive processing time
▶ Limited collaboration
▶ Difficult student record retrieval

Solution

▶ DocStar® ECM

Benefits

▶ Improved customer service with real-time status updates
▶ Reduced printing and physical storage costs
▶ Improved workflow processes and employee productivity
▶ Increased document security and regulatory compliance

Penn Foster is one of the nation's leading distance education institutions, offering career-focused education at the high school and college levels for more than 120 years. The firm has been lauded by a number of nationally recognized press institutions—including the Wall Street Journal, PBS, the Boston Herald, and FOX Business—for its high-quality, low-cost certificate and diploma programs.

Operating primarily out of Scranton, Pennsylvania—with satellite offices in Boston, Massachusetts and Phoenix, Arizona—the firm employs roughly 300 individuals. Millions of documents are processed on an annual basis between the three locations, allowing Penn Foster to enroll and educate more than 150,000 new students each year.

In 2012, Penn Foster senior managers realized that their existing system for processing documents was antiquated, offering only basic archival solutions and little in the way of efficiency and productivity. Penn Foster Manager of IT Services Tim Condon, describes the limitation of their initial system, "The platform basically stored the documents. They were scanned into the system and it stored them in retrievable format electronically, and that's pretty much the full extent of what it did."

What Penn Foster needed, however, was a solution that allowed them to do much more with their content than merely scanning. They needed to be able to collaborate, annotate, and track documents so that workflows could be automated and processing time could be reduced.

DocStar ECM integration and application evolution

After an initial review of the DocStar solution, it was clear to Condon and other Penn Foster managers that the platform would provide the flexibility they desired in handling their content. The ability to move documents between parties and take notes without actually changing the document itself was especially attractive, as was the potential for improved workflow.

The first hurdle to integration occurred before the process had even begun—Penn Foster had amassed a plethora of documents in their existing system. Transferring such a quantity of data would be slow and could lead to potential down time. In order to avoid such situations, the DocStar team developed a completely new program that tripled the rate of document uploads. This allowed for zero down time, fast integration, and rapid deployment.

After all of Penn Foster's existing documents were moved onto the DocStar system, it was initially deployed within the Data Processing department—which is responsible for 75–80% of the document flow occurring within the organization.

The platform was subsequently deployed at Penn Foster's customer service call center. There, agents require instant access to a variety of student records—including enrollment and transfer forms, student documentation, scores, and grades. With their previous system, Penn Foster customer service agents had access to only a limited selection of electronic data for each student. However, with the DocStar solution, all data pertaining to each student is tied directly to their student number, and all student data is housed in a central platform—allowing representatives to pull all student data with one query.

Since then, the application of the DocStar solution has continued to evolve and grow. "With the other system, we basically did one function. Now, we are looking at an enterprise-wide document system," Condon states. Looking ahead, he anticipates continued application development. "Really I see it expanding workflow in areas that require multiple approval levels."

Penn Foster is also exploring the option of leveraging cloud capabilities. "We're looking at giving some offsite graders some access to the DocStar system, and we would use the web to do that." Users would simply open their browser, log in through WebWorks, and get instant access to all the data they need.

Partner relationship

One of the most significant aspects of the integration for Penn Foster management was the service they received from the team at DocStar "They have been absolutely helpful with implementation. They were there when we needed them—every time we call them. They help us with any kind of new challenges we run across. The experience has been great with DocStar—there is nothing I can complain about at all."

What's more, DocStar provided Penn Foster with the tools and information they needed to facilitate faster deployment in additional areas of the institution. "We've gone through training sessions and we are able to set up our own templates and workflows now," Condon explains. "As new workflow requests come in from the user communities, we have the ability to pretty much get it tested and out in production within a couple of weeks."

Implementation impact

Improved customer service

The representatives at Penn Foster's call center handle a myriad of calls every day—a majority of which pertain to student services and consequently require access to a variety of student documents. In the past, the agents only had access to the data that had been uploaded in the system. If the required document had gone through Data Processing (DP) Service's scanning system at least 24 hours prior to the call, then the agent would have access to it.

However, in some situations, the required document either had not had sufficient time to upload, or was never in the DP Service's scanning system queue. In such instances, the call would have to be dropped so that the agent could locate the paper document—at which time the agent could return the call. Naturally, this was an inconvenience for both the agent and—more importantly—the caller.

With DocStar ECM, the agents can look up records and see what the status is in real time. What's more—because the agents are provided with a holistic view through immediate, centralized access to all the student's data—they can answer questions across the board. This allows for customer service inquiries to typically be answered in one call, which improves customer satisfaction and allows the agents to process calls more quickly.

Reduced Costs

In addition to supporting the business objectives noted above, there were also direct financial savings for Penn Foster. As a result of implementing the DocStar solution and increasing their reliance on electronic documents, Penn Foster was able to reduce both printing costs and physical storage space.

Increased productivity

The flexibility and real-time access that DocStar ECM has enabled across multiple functions within Penn Foster has had a dramatic impact on productivity. Employees can automate HR and Communications workflows—a process that used to take weeks now takes just hours. With a few clicks, they gain access to any documents they need and can annotate such documents in real time, reducing the disparaging likelihood of duplicate effort that persisted with traditional paper documents.

Condon noted two specific workflows that have been chiefly impacted:

▶ HR workflow: Because hiring decisions involve multiple stakeholders and decision makers, the process is often both time-consuming and document-intensive. The process begins when a first level manager submits a form to HR and then HR proceeds down a number of potential paths involving second level managers, department directors and—in some cases—the CFO before circling back to HR. With electronic documents, Penn Foster is able to decrease the amount of time it takes to process a hiring package, improving the employer brand and ability to acquire top performers.

▶ Communication workflow: This occurs in many directions, across many channels, and can be extremely difficult to manage. "Let's say someone wants to change the welcome letter we send out to students. Someone submits a request for creative writing to the coordinator," Condon explains. "She then takes the receipt of that letter with the changes requested and sends it down the appropriate workflow path for approval. It comes back to the coordinator, who compiles changes and sends it out for final approval. Everybody signs off, and then she sends it to production. There are about five or six flows in that one." What really improved this process—in addition to the digital format—was the ability to add comments via sticky note annotations. Through this method, everyone could add their input without changing the initial document. In other words, everyone had access to the original throughout the editorial flow process.

Because of the improved workflow performance, employees were able to allocate their time and efforts towards other processes that required more in-depth interaction.

Security and compliance

Many of the student documents and data that Penn Foster maintains include personal student information that cannot be shared with outside parties. "DocStar ECM has more robust security than the previous system did," states Condon. The features most notable for Penn Foster were the encrypted disc drive solution and the ability to segment access groups.

Data and images are sent out using proprietary encrypted disc drives so that should the discs fall into the wrong hands, the data contained cannot be viewed without the correct drive.

Folders and groups can be locked down so only certain individuals can access data. This feature improved the efficacy of data-gathering in the HR department, where compliance is particularly stringent.

When compared to the liability associated with losing or misplacing paper documents, the security features of the DocStar solution offered an exponentially superior insurance policy.

Key findings

Prior to implementation, the issues and challenges of document management touched Penn Foster stakeholders across the board. However, with the DocStar platform, employees are able to operate more effectively, and external parties are better served through improved security and customer service. With such a strong foundation, Penn Foster is better equipped to fulfill its mission of helping students acquire the skills needed to advance in their chosen field, begin new careers, or pursue their passion.

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

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