



COMMUNITY  
DEVELOPMENT  
SOLUTIONS  
Formerly General Code CMS LLC

# Workflow Automation Case Study: Eaton County, MI

IT Project  
of the Year

Eaton County's  
Accounts Payable  
Process Automation  
selected as the

**Michigan  
GMIS IT Project  
of the Year.**

Laserfiche®

## The Challenge

Eaton County, Michigan has 25 different operating departments that are mostly geographically dispersed in different County facilities. The process of routing paper documents and records as part of the Accounts Payable process has, for many years, involved the physical movement of files by personnel walking or driving to and from different locations to pass documents for approvals. This process was time consuming and costly.

The County has been a very successful Laserfiche Document Management user for almost 20 years. In 2009, County CIO Dr. Robert Sobie authorized a test of an earlier version of Laserfiche's workflow module for streamlining the Accounts Payable process. But further use of workflow was postponed until the product matured in ways to add greater flexibility.

In 2012, in the midst of an overall downsizing of County personnel, the County IT Department decided to re-examine the idea of using Laserfiche workflow to maintain—and even improve—business processes. The County Controller's Office always operated with small numbers of employees. During the downsizing, the elimination of even a single position would have created a significant impact on the Office's ability to operate effectively. The potential benefits of time and cost savings were apparent. In May 2012, he decided to re-launch Laserfiche workflow within version 8.3.

### Project Objectives

Dr. Sobie set out with modest objectives for the AP workflow implementation, including:

- Put the entire IT department through workflow training.
- Map and incrementally adopt the Accounts Payable process.
- Minimize costs by doing most of the work with inside staff, avoiding the cost of the reseller's team building and implementing workload.
- Limit the resource drain on the inside IT staff working on this project.

### The Results

By the end of August 2012, three months after the project began, nearly two dozen departments were up and running on the AP workflow process and the IT team had all remaining departments engaged by the end of 2012.

The system is eliminating nearly 100% of the foot traffic and vehicle trips related to routing the documents and gaining

approvals across the County. Previously, one vehicle had to travel 45 miles round trip at least twice per week to a large satellite office of the County Sheriff. This no longer occurs. Also, lost documents and time spent backtracking to look for files and documents have been virtually eliminated.

The time for workflow design and development, as well as implementation and training of users, was primarily done by the IT Department's Administrative Assistant Ashley Bancroft. She has been with the IT Department for nearly three years, has no formal technology training, but is what Dr. Sobie terms an idea scout. "We had expected her to evolve into a technical support role over time when we hired her a little less than three years ago. With this project she latched onto the Laserfiche workflow designer and has been the primary driver in moving this project to where it is today, just four months after the software upgrade was installed." Dr. Sobie added that, "This is a complex workflow with so many departments and variations in the way different items are reviewed and approved depending on the departments. We just expected this to take a lot longer than it has." Dr. Sobie notes that the entire IT staff went through the workflow training and has provided support

*Continued on Back*

---

through the process but Bancroft's initiative allowed the rest of the staff to remain focused on other important projects.

## Unexpected Benefits

Dr. Sobie describes this new process as "transformational" because of how it has changed a county-wide business process to be more efficient and effective. "Transformational" also describes how the County's IT Department views other business processes operating in the County. Today, many other processes are viewed through a "workflow lens," allowing new ideas to be suggested about how the processes could work. To Dr. Sobie, this is particularly important because, as he notes, "We were generally perceived as a computer infrastructure and services department. This is not uncommon and is certainly part of the role that IT must play in the County. Implementation of Laserfiche Workflow changed the relationship between users and the IT Department by engaging IT as business process engineers or consultants. We have departments now asking us when paper-based processes in their areas can be automated using the Laserfiche software and we are assessing several intradepartmental processes for automation that can now begin sooner."

In terms of the success of the rollout, Dr. Sobie highlights three key elements to their success:

1. Laserfiche's product (specifically the workflow designer tools) are easy to use, intuitive to learn and fun to work with. "They've done a tremendous job moving the product forward."
2. ICC Community Development Solutions' training and knowledge of the product was extremely helpful. "We went through three days of well-orchestrated training for me and my team. When needed, we were provided supplemental support and design services throughout the project."
3. An internal Laserfiche workflow designer. "We had a new person in Ashley who really took ownership of this project and the work she has done to build workflow, train, and support the users. Ashley has shown tremendous initiative as well as patience while analyzing current processes and offering ideas to streamline and automate them using the Laserfiche tools."

## Going Forward

The incorporation of Business Process Automation using Laserfiche is very consistent with the County's Strategic IT Plan. Key objectives of the plan for the next several years are to implement new processes to create greater efficiency, lower costs and improve productivity. Evaluation of current business structures and potential redesign and re-organization of those structures are a big part of the plan and workflow implementation is a key innovation that will allow Eaton County to reach those productivity objectives.

## ICC Community Development Solutions

781 Elmgrove Road | Rochester, NY 14624

Toll Free: 855.436.2633

[www.iccsafe.org/CDS](http://www.iccsafe.org/CDS)

Helpdesk: 855.436.5500