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Westbank First Nation elevates **employee experience** and **safety**

About the customer

Located in south central British Columbia, Canada, Westbank First Nation is one of eight Okanagan Nation communities, comprised of five reserves totalling approximately 5,340 acres. There are approximately 855 Westbank First Nation members, the majority of whom reside on the reserve along with 9,000 non-member residents. The First Nation has implemented one of the most comprehensive sets of community laws in Canada that cover the development and regulation of reserve lands. Through its administration, Westbank First Nation operates a number of community services including: daycare and preschool services at Westbank Child Development Centre; a multidenominational church; and Sensisyusten House of Learning, a kindergarten to grade six elementary school.

Challenge

The Westbank First Nation (WFN) government comprises about 200 staff members who serve a population of 10,000 residents spread across four reserves. WFN needed to address silos between departments and improve efficiency with internal requests, which involved many manual tasks that were tedious and cumbersome. The organization sought to automate and digitize processes to enhance the experience of accessing services for both employees and members. WFN was also looking to digitize and archive its existing paper records in storage.

After exploring options with its digital workplace solutions provider, Ricoh Canada, WFN selected Laserfiche, an enterprise content management (ECM) system. Since the implementation more than a decade ago, WFN has worked with Ricoh to expand its digital transformation efforts by adopting workflow management applications and forms management to automate business processes and utilize metadata to improve reporting and turnaround times.

Today, with Ricoh's support, WFN has effectively leveraged their ECM system for numerous internal processes across departments, streamlining approvals and records management through automated document routing. In addition to time savings, benefits also include being able to efficiently conduct contact tracing efforts during the onset and peak of COVID-19; and the flexibility to continue addressing community health and safety through incident reporting.

> **"We grew so fast as an organization, identifying many processes that we could streamline along the way. Laserfiche has provided us with an opportunity to assess our processes and improve the organization holistically."**
>
> **Chad Rota,**
> **Records and Information Management Supervisor,**
> **Westbank First Nation**


WESTBANK
FIRST NATION

Solution

Establishing a digital foundation

WFN manages over 4,400 properties, which requires intensive property tax documentation processes. From early on, WFN recognized the need for a more efficient records management system. A majority of its vital records management and property tax documents relied on off-site filing, resulting in substantial fuel surcharges to store and retrieve boxes. Seeing an opportunity to improve compliance, transparency and efficiency, WFN explored ways to digitally transform the way the organization managed these documents.

"The repository grew from managing meeting minutes and policies into managing working documents and case files," said Rota. "We really experienced an organization-wide transformation — department by department."
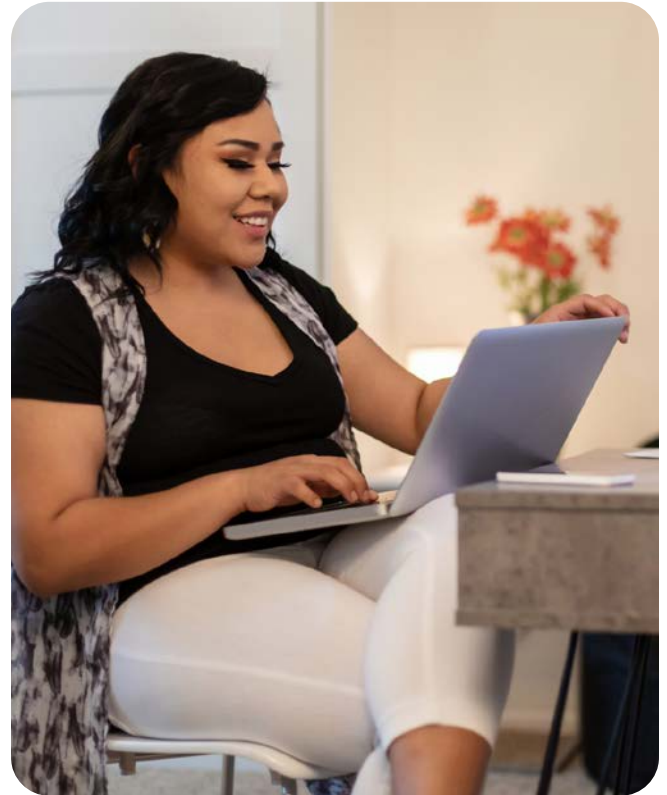
Today, the organization uses their ECM system to process all documents related to each property tax folio digitally, and automatically store them in a centralized location, eliminating lost files. The system enables metadata to be attached to each document, making them easily searchable. The process now requires less paper, which originally required five floor-to-ceiling shelves containing over 4,000 folders to store. Now, there are only a few small folders for processing documents that either need to be scanned weekly or mailed out to residents, helping to improve responsiveness to members. As the organization grew, file storage rooms were converted into functional workspaces.

Case Study Government

## Increasing administrative efficiency and elevating the employee experience

Following the success of digitizing its document management processes, the organization recognized that internal requests, such as employee change notifications and reports could also be digitized and automated, reclaiming time for employees who were manually managing files being passed between departments.

"We really needed a way to improve monitoring and transparency to streamline these submissions," said Rota.

WFN also implemented a Ricoh-provided electronic forms solution, which enables forms to be edited digitally without being passed between departments for amendment and approval. This system has been fully adopted and integrated across the organization, including the finance, legal and HR departments. Notably, finalized employee change notification requests are automatically filed in their ECM system via an automated workflow, with a notification sent to the payroll team for review and approval. This fully digital process has increased efficiency and boosted employee satisfaction as requests are resolved more rapidly.

Additionally, the request portal is hosted using electronic forms which can be easily modified and updated with newly available resources. This has supported the dissemination of information throughout WFN, creating a self-service portal for employees, who now have the independence to navigate forms, pending requests and their associated documents.

"Being able to access everything in one central location has empowered staff to become more independent and self-sufficient," Rota said.
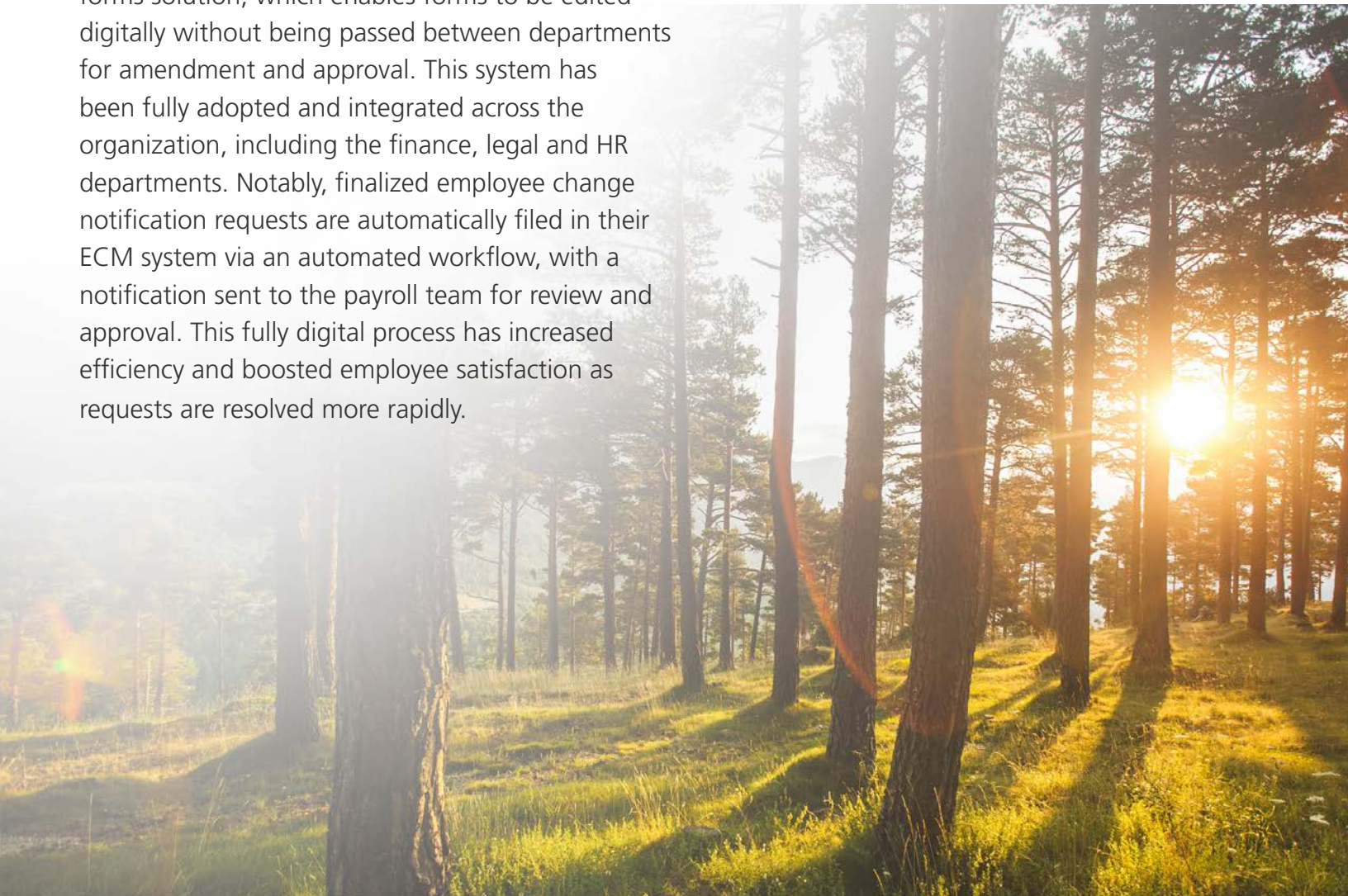
Prioritizing employee health and safety

In addition to creating a long-term digital culture, Ricoh has provided WFN with a high-level view of working conditions for its employees, improving health and safety when it matters most. If an incident occurs on-site, employees can complete a dedicated form which is automatically forwarded to WFN's occupational health and safety advisor, while notifying the director of the submission. The system generates a corrective action task, prompting a discussion about the cause of the individual incident and preventative measures. In addition to metadata based on the location and department of the incident, WFN can leverage advanced reporting tools to identify health and safety trends and make more informed, data-driven decisions to improve conditions for specific locations.

This system also helps support compliance requirements in terms of policy development as WFN submits annual reports to regional and national governing entities in Canada. Now, employees can extract relevant information from incident responses and complete these forms more quickly and accurately. Additionally, during the early stages of the pandemic, WFN also used their ECM solution to support contact tracing efforts, developing a dedicated form for employees entering the premises in order to comply with British Columbia's health reporting requirements – eliminating the need for specific Health and Safety software.

Results

Understanding organizational priorities

Through their partnership with Ricoh Canada, WFN has been able to establish replicable solutions that can be applied to a variety of processes enabling WFN to optimize its resources while empowering employees to be more independent and less reliant on paper files. Documents can be retrieved in seconds, allowing employees to work far more efficiently and take more ownership over core processes. Achieving such substantial savings in time and resources has translated to reduced operational costs and headcount allocations, allowing the organization to run more efficiently.

"We are able to go from the troubleshooting and testing phase to launching new processes so rapidly because we have so much at our fingertips," said Rota. "It's easy for us to mobilize efforts and prioritize our workload the right way."
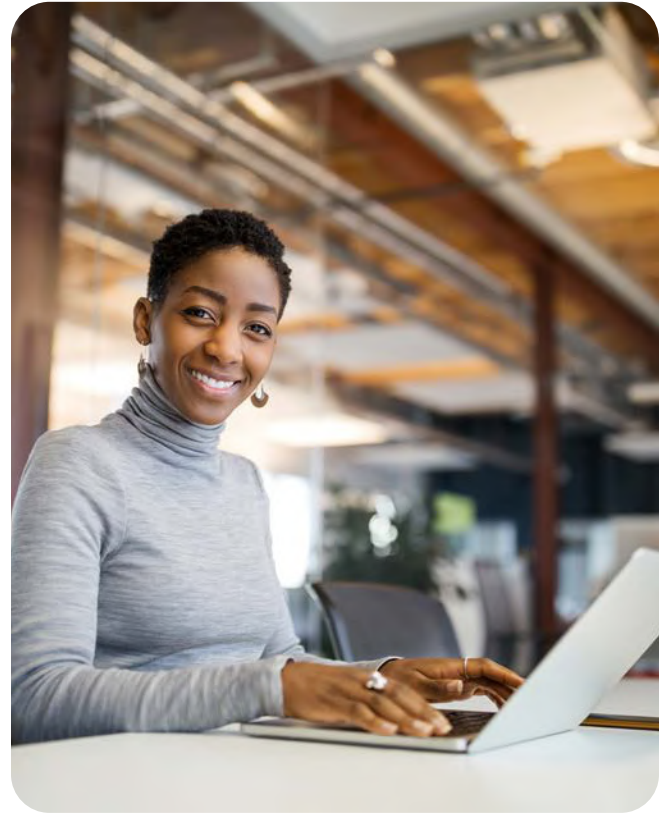
In terms of future digital transformation plans, WFN is working to digitize and streamline their accounts payable processes. The organization is also exploring cloud infrastructure services as a storage solution moving forward.

Beyond simplifying WFN's records management and automating core processes, the organization has also chosen Ricoh as a partner for their in-house printing needs for over 15 years. This includes the deployment of 25 multifunction printers and other print devices, designed to offer quality and versatility – enabling greater convenience and cost savings for WFN.

Empowering digital workplaces

With 85 years of global experience developing the technology that shapes how people work, Ricoh understands what it takes to support the priorities of Canadian organizations with the right technology that puts people first. Our solutions connect people to information – and each other – so they can innovate and collaborate to drive growth.

Your workplace needs experts, which is why we're here. We work in close partnership with our customers to understand their unique challenges and provide expertise where they need it the most. With teams across Canada, we can provide our award-winning enterprise-level support and guidance, but on a local basis and tailored to your specific needs.

As digital workplaces pave the way to the future, the need for better processes, better collaboration and better results while supporting agility has become critical – and this is where Ricoh can help. Through our portfolio of innovative technologies and services, we can support your journey towards digital transformation, so that you can better focus on serving your communities, customers and partners.

Ricoh is a leading provider of document solutions and a market leader in process automation. We have been instrumental in shaping workplace innovation solutions for organizations across Canada for more than a decade. Let us help you redefine work and **Change**. **For better**.

WHY RICOH?

✓ 500+ customers nationwide, including 350 Fortune 500 companies

✓ 20+ years of experience processing key documents and workflows

✓ 4 document processing centres located across Canada

✓ Flexible BPaaS solutions that will optimize your budget and scale with you

✓ Business process consultants with deep expertise in a range of industries — from government to education and more

Learn more about Ricoh Digital Document Management, Electronic Forms and Process Automation <u>here</u> or <u>get in touch</u> with a Ricoh representative today.

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