



## CASE STUDY

# Clark Consulting Sets Foundation with Captaris Workflow, Previously Known as Teemplate

*Supporting its focus on best practices, Clark Consulting's Banking Practice completed an extensive evaluation of workflow solutions. Its investigation ended where it began, with Captaris Workflow, powered by Teemplate, for its ease-of-use and flexibility. Recognizing efficiency benefits, top executives at Clark Consulting have mandated workflow production based on Captaris Workflow for every department. After all, practice makes perfect.*

## BACKGROUND

With more than 70 offices across the U.S., Clark Consulting offers a range of consulting services to help clients attract, retain and reward employees. As a whole, the company provides integrated compensation, benefits and benefit financing solutions to over 3,900 U.S. corporations, as well as banks and healthcare organizations. With nearly 300 employees, Clark Consulting's Banking Practice is the largest and most comprehensive provider of compensation, benefit and BOLI (Bank Owned Life Insurance) portfolio services to banks and organizations across the country.

## THE CHALLENGE

Clark Consulting's Banking Practice carries decades of experience helping businesses keep their best people. To further propel its success, the firm focused efforts on its own best practices. Specifically, during 2004, workflow became a number-one priority for the firm.

"Efficient workflow provides consistency of process," Larry Berhow, Vice President of Information Technology for the practice, said. "We've grown immensely over the last several years—from 30 to 300 (employees). When you do that, by nature, you compile a lot of different approaches to doing things."

One process seeing variation was the Prospect and Client Management System (PCMS). After developing a benefit plan or life insurance investment with a banking client, Clark Consulting then secures a binder with insurance carriers. The binder gathers imperative information on individual participants obtaining policies. Not surprisingly, the process involves copious amounts of data to be packaged and managed, not to mention various salespeople, employees, carriers and so on. The end result is a large ticket item for Clark Consulting. "A binder often ends up containing hundreds of policies," Berhow said. "Typically, the total premium is in the millions of dollars."

With so many details and contacts involved in the binder transaction, completion was often delayed due to lack of data or contact unavailability. Bill Currie, manager of Software Development with the practice, related: "Using the old process, employees would try to track others down with emails and voicemails. One person would know what needs to happen while five people *need* to know, but there was no central way to track status."

Clark Consulting created an integrated workflow evaluation group and investigated almost a dozen offerings. User representatives from all departments and key regional offices paid attention to the user interface while the IT team watched for flexibility and integration capabilities to support its .NET architecture and customized applications. "We were considering what would meet business-user needs while being tightly integrated with our systems," Currie said.

## THE SOLUTION

The first solution demonstrated to Clark Consulting was Captaris Workflow, powered by Teamplate. By the end, the team had assessed several solutions but arrived back at the beginning. "Many times the first one in the door suffers from people not knowing what they're looking at," Berhow said. "It's probably a tribute to the product and (our Captaris sales representative) that we never lost sight of Captaris Workflow." In fact, he continued, Captaris Workflow became a benchmark for evaluating other products.

The Captaris competitive advantages: the user segment of the evaluation team liked the user interface, explained Currie, but the deciding factor became its flexibility and open architecture. By integrating Captaris Workflow into its custom system, Clark Consulting plans on efficiency returns that will prove beneficial for every department. Berhow related: "One of the major benefits we will accomplish is a best practices methodology (for PCMS) as a key business process. It will return less re-work and a better overall product for our clients."

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**Integration** - "Captaris Workflow offered the best integration capability and gave us the most control," Berhow said. "Yet it has enough features that we didn't have to develop everything." Clark Consulting has a custom interface called the Banking Practice Standard User Interface. To ensure user acceptance and productivity, Berhow and his team wanted a workflow solution that would work with existing and future custom design as well as other technologies, such as Microsoft Sharepoint Portal. "We came to the conclusion that we had flexibility with the .NET environment and Captaris Workflow seemed to be the most open-architected," Currie said. The number two workflow solution in Clark Consulting's evaluation had "a proprietary way of storing so we felt it would be impossible to work with," he explained.

Having an integrated system breaks down walls, according to Berhow. "In the past, everyone has talked about *their* clients and data, and now it will be *the* client and *the* information." He continued: "Because our systems are tightly integrated, our new concept of PCMS is that it will be *the* Banking Practice system. All functionality for any job will be within the system. We needed workflow capabilities to be the substance that binds information together."

**Business Process Management** - Berhow added specifics on how Captaris Workflow benefits the PCMS process: "All data and tasks will be pulled from a central database. When changes are made, all people will be made aware of it which will hopefully cut down on a lot of re-work." In fact, regional representatives—even banking clients—will have easier access to updated data at any time, giving them the ability to be proactive rather than reactive. "Captaris Workflow will provide a way to distribute and organize information that, up to this point, has been hard to manage," Berhow said.

Starting with PCMS, Clark Consulting described a new mode of operation centered on business process management. "The vision is to leverage Captaris and business process management every day," Currie said. For example, once it completes the first installation with the PCMS process, the firm will develop a workflow to manage salary continuation plans—an annual client administration effort. Clark Consulting expects to add another six to 10 workflow processes with system integration. "It's not proof of concept," Currie said. Clark Consulting has already recognized the importance of an effective, integrated workflow. "We're building a foundation for IT and business."

## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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