

IACA 2008 - SALT LAKE CITY

UNITING LOCAL AND GLOBAL PERSPECTIVES

Merit Award Application and Criteria

Completed applications must be received by: March 15, 2008

Send completed application to: **Randy Moes**
1019 Brazos, Suite 505
Austin, TX 78701

Criteria:

1. Any technology project initiated by the filing office that improved the efficiency of the office, service to the customer or otherwise benefited the office; or
2. Any innovative changes in your office that have been implemented that have allowed the office to continue or increase its efficiency.
3. Only those projects that have not been previously selected for recognition and which are presently in operation may be nominated (projects which are planned or currently under development are not eligible)
4. Application must be accompanied by a separate detailed description of the project or innovation and must demonstrate how it has enhanced your office. Award recipients will be given 10 minutes at the 2008 IACA Conference to present their project.
5. While specific content of the submission is not mandated, project should include; an introduction to the project, description of the project, results of implementation, cost-benefit of project and lessons learned.

Jurisdiction: _____ **Michigan** _____

Submitted by: _____ **Linda Garrison** _____

Date Submitted: _____ **March 14, 2008** _____

Brief Description: Paperless Correspondence File

Detailed Description:

Two different programs were instituted which allow staff to view correspondence without going to a file cabinet to retrieve it. The first was an existing program which allows for the creation of a standard style letter for annual reports and annual statements. It was revised this year to make the letter viewable while looking at the record from your desk. This made it easy for any one to answer questions over the phone regarding the correspondence that was sent.

The second was created by staff to organize and access examiner letters which are associated with document submissions and are more technical in nature. An Excel spreadsheet kept in a shared location was created containing hyperlinks to all letters by date and examiner; a desktop shortcut icon to the spreadsheet was provided to each document examiner.

(S:\PUBLIC\Corp\DocRev_ExaminerLtrs_cdm). This allows examiners to easily answer phone calls from customers without retrieving the letter from the file and having to return a call to the customer

Cost-Benefit:

1. Improved customer service and eliminate unnecessary aggravation and delays by being able to respond to customer inquires immediately.
2. Improved customer service by allowing examination staff to pull up the letter on any pending document at their desk and easily answer calls on any submission.
3. Saved time and improved service by no longer having to leave desk to find paper files to assist customers on the phone or process a response to our correspondence.
4. Improved customer service and saved staff time by being able to respond to inquiry without having to first locate paper file in a file cabinet or on someone's desk.
5. Saved on costs for paper by eliminating copy for the file.
6. Reduced storage space needed to two drawers.
7. Eliminated need for staff to file copies, retrieve copies, and re-file correspondence.
8. Reduced long term storage costs by eliminating need to box up these letters and transfer to Record Center for storage for 2 years before destruction.
9. Provides managers a quick way to monitor examiner proficiency, especially useful during training.

The cost of changing the existing program to permit letters to be viewed and of creating the new process for storage and retrieval of examiner letters were minimal. The changes have improved productivity and reduced manual steps.

The time savings for staff is approximately 5 minutes per letter. Those minutes saved are used to provide better service. The number of documents received each year has increased, but staffing has not. The time saved permits the Division to provide 3 day turn around on non expedited documents and meet timely all requests for expedited services. For customers, the ability to obtain an immediate response to an inquiry eliminates phone tag and reduces delays in completing of filing of documents.

Lessons Learned:

Inexpensive procedure changes can result in major improvements in customer service. Staff input regarding the daily tasks that are most annoying to them and the public was extremely useful in identifying areas where improvements could be made.

**Awards will be presented at the 2008 IACA Conference.
Award recipients should be prepared to give a brief
presentation (approximately 10 minutes) about their project.**