
Customer Story:

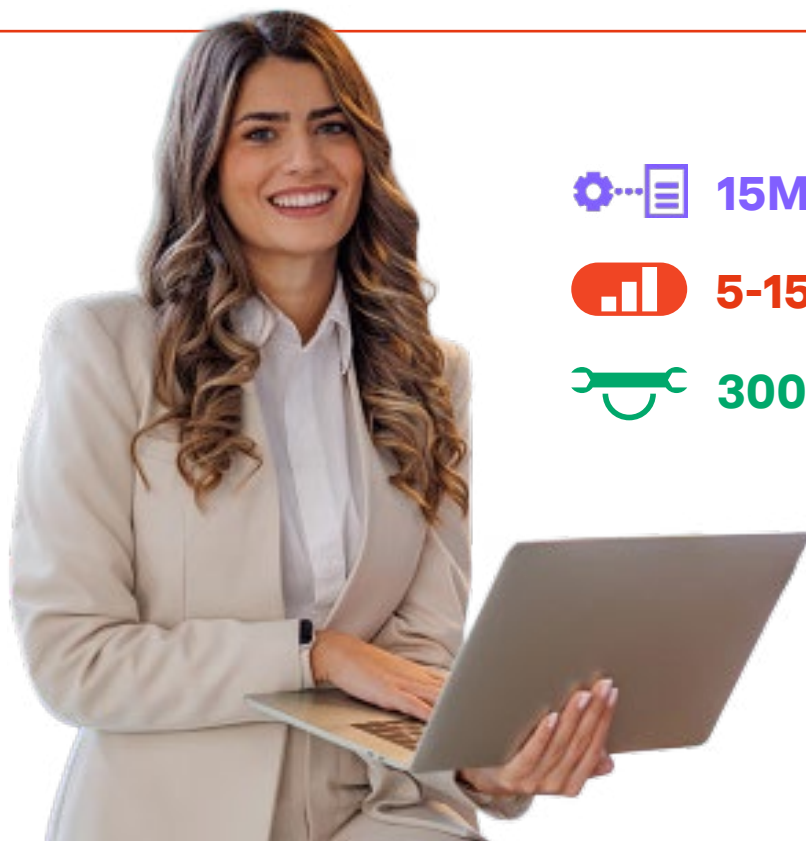
Professional Services Advisor


Leading professional services organization experiences rapid growth and partners with Ricoh to expand DocuWare services and support

This large, national professional services advisor orchestrates multiple service lines across many departments including accounting, tax, advisory, benefits, insurance, and technology. After an acquisition that increased users to nearly 4,000 and added an extensive document archive, they partnered with Ricoh to optimize and scale their DocuWare electronic document management solution across the organization. The results have been transformative.

“Working closely with Ricoh has allowed us to continually evolve DocuWare to meet the needs of a growing, acquisition-driven business.”

— DocuWare Team Member



 **15M** documents added in one year

 **5-15TB** in storage growth annually

 **300 hours** of yearly Ricoh support

Challenges

- Rapid, acquisition-driven growth created exponential demand for document storage, indexing, and user provisioning
- Original vendor support proved unreliable
- On-premises capacity and cost constraints while cloud hosting was cost-prohibitive given the limited user license model

A leading professional services advisor with clients nationwide had been partnering with Ricoh for years when entering a new phase of growth in mergers and acquisitions. While these were exceptional opportunities, there were challenges associated with the pace and scale of the company's growth.

The organization had been meeting regularly with the Ricoh team to consistently evolve. But this was a paradigm shift. Acquisition-driven growth had created an exponential demand for document storage, indexing, and user provisioning in DocuWare. This was a critical expansion period and given the amount of user licenses that would be needed, the company needed a better solution and consulted with Ricoh to create one.

Solutions

- Partnered with Ricoh engineers to provide ongoing technical support, system design, and implementation assistance
- Doubled production resources by adding two servers, bringing production capacity to four servers to handle peak loads and acquisitions
- Standardized ingestion methods including drag-and-drop, watched folders, and Windows Explorer imports to accelerate intake and reduce manual effort
- Integrated DocuWare with Active Directory for single sign-on and role-based access controls; pursued targeted integrations with SharePoint and other backend systems to streamline workflows

After a comprehensive assessment, the Ricoh team got to work. Through weekly design and project calls, they began helping the firm transform workflows and processes in DocuWare to prioritize and scope expansion efforts.

Ricoh doubled production resources by adding two servers, standardized ingestion methods to reduce manual load, and integrated DocuWare with Active Directory for single-sign-on access. They also pursued targeted integrations with multiple CRM systems, Oracle®, multiple tax software, data warehousing, and other backend systems to streamline workflows.

By implementing indexing and workflow automation to group related documents and automate check processing, the company significantly reduced their manual sorting and reconciliation efforts as well — with some team members saving up to four hours a day. And with continued on-premises deployment to retain control over data and managing licensing costs, Ricoh helped the company scale storage by up to 15TB in a single year.



Results

- Millions of new documents were added in one year, bringing the total archive to nearly 18 million documents system-wide
- Nearly 1,000 new users onboarded with an additional ~800 expected to join
- Storage capacity increased by 5 to 15 terabytes in a year
- Four production servers support day-to-day operations and peak processing

Working with Ricoh has helped this organization to grow and scale effectively. But with continued growth driven by acquisitions, the company will require ongoing capacity planning, additional user onboarding, and deeper integrations with enterprise systems to extend automated workflows and retention controls.

Fortunately, Ricoh will be there with 300 hours of yearly support to continue to evolve solutions, maintain on-premises deployments, and evaluate cost-effective options for future hybrid expansions.

“DocuWare is a mature, scalable EDM solution that’s perfectly tailored to large professional-services environments. By partnering with Ricoh, we have continuous collaboration, reliable support, and workflow optimization that meets the evolving business requirements of today — and tomorrow.”

Senior Specialist — DocuWare Team Member

Learn more about how to keep information flowing and increase organizational agility with [DocuWare](#).