



## Case Study: WestBank First Nation

### Westbank First Nation community utilizes enterprise content management integration to improve customer and employee experience while boosting efficiency and compliance

#### About our customer

Located in south central British Columbia, Canada, Westbank First Nation (WFN) is one of eight Okanagan Nation communities, comprised of five reserves totaling 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.



Westbank 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 several important community services including daycare and preschool services at Westbank Child Development Centre, a multi-denominational church, and Sensisyusten House of Learning, an elementary school.

The Syilx (Okanagan) cultural framework is built on the foundation of Syilx cultural ways of knowing and has been passed down from one generation to the next, orally through storytelling. When we tell Chaptikwl, “our stories”, we breathe life into the ember that is waiting to come alive again. The Chaptikwl illustrates the Enowkinwixw process, the cultural practice or discipline that describes how to plan, solve problems, make decisions, resolve conflicts and/or develop an action plan.

The four (4) Chiefs: Skemxist (Black Bear) Siya (Saskatoon Berry), Spitlem (Bitter Root), Ntyxtix (King Salmon) then came together and made a plan for how to feed Stelsqilxw (people to be). The story then tells how the differing perspectives of the four chiefs were brought together to inform the discussion, the problem solving, the decision making and the action plan.

The Chaptikwl illustrates the Enowkinwixw process, the cultural practice or discipline that describes how to plan, solve problems, make decisions, resolve conflicts and/or develop an action plan. It brings people together to dialogue on specific issues. The practice welcomes, encourages and supports the expression of differing perspectives that, at times, may be in opposition to each other. The practice of Enowkinwixw embraces the dynamic tension that emerges and uses it to develop a collective understanding or to shape a shared approach to an issue or concern.

-Simon Fraser University, "The Syilx Cultural Framework"

## Challenge

- Time-consuming, error-prone manual tasks
- Interdepartmental silos that hindered transparency and sharing
- Manual processes that hinder submitting timely compliance documents with governing entities
- Inefficient and substandard employee and member experience in accessing services

Leadership at WFN recognized the need for enterprise content management integration, a solution that would address silos between departments and improve efficiency with internal requests. Managing information involved many manual tasks that were tedious and cumbersome. They also 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.

In addition, with over 4,400 properties to manage and intensive property tax documentation processes, WFN saw the need for more efficient records management. Most of its vital records management and property tax documents relied on off-site filing, resulting in costly document storage space and substantial fuel surcharges to store and retrieve boxes.

## Solution

- A WFN/Ricoh partnership that fully supports the organization's employees
- Laserfiche Enterprise Content Management
- Digitized documents and automated processes
- Enhanced governing entity compliance

After exploring all the options, WFN selected Laserfiche, an enterprise ECM system, to meet their needs. With Ricoh's support, WFN has effectively leveraged Laserfiche for numerous internal processes across departments, streamlining approvals and records management through automated document routing. In addition to time-savings, benefits also include the flexibility to continue addressing employee health and safety through automated incident reporting and processes that yield data-driven insights.

**"With Ricoh as a partner, we have expanded our digital transformation efforts by adopting workflow management applications and forms management that automates processes and utilizes metadata to improve reporting and turnaround times. Another benefit? Being able to access everything in one central location has empowered staff to become more independent and self-sufficient."**

— Chad Rota,  
Records and Information Management Supervisor



A critical component of the ECM is Laserfiche Forms, which can be edited digitally without being passed between departments for review. This system has been fully adopted and integrated across the organization, including finance, legal and HR. 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. The request portal, hosted using Laserfiche forms, can now be easily modified and updated with newly available resources.

Notably, finalized employee change notification requests are now automatically filed in Laserfiche via an automated Laserfiche Workflow, with a notification sent to the payroll team for review and approval. This fully digital process has increased efficiency, boosted employee satisfaction as requests are resolved more rapidly, and enabled the organization to transform document storage space into much-needed office space.

“Being able to access everything in one central location has empowered staff to become more independent Laserfiche users,” says Rota.

## Results

- Faster, real-time, secure, and error-free document sharing and reporting
- Significant improvements in operational efficiency
- Time and resource savings
- Reduced document retrieval time to seconds
- Insight-driven improvements in employee health and safety
- More efficient use of workplace real estate

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 by automating processes such as incident submissions. With advanced reporting, the organization can now 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. Employees can extract relevant information from incident responses and complete these forms quickly and accurately.

Since its 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.

Through the partnership with Ricoh, 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.

Today, the organization uses its ECM system to process all documents related to each property tax folio digitally, and automatically store them in a centralized location, eliminating lost files by 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! Those storage rooms have since been converted into functional workspaces — a win-win!



Lastly, but importantly, Ricoh is pleased to continue committing resources to building positive relations with Indigenous communities and stakeholders. In 2023, the company achieved Bronze level certification for the Progressive Aboriginal Relations (PAR) program from the Canadian Council for Aboriginal Business. The company actively seeks wisdom and truth through ongoing dialogue and learning, investing in enhancing Indigenous cultural awareness, and consistently upholding honesty and integrity in all interactions with Indigenous communities.

**“We saw an opportunity to improve compliance, transparency, and efficiency. With the help of Ricoh, we were able to digitally transform our document processes and, as a result, we were able to accomplish much more.”**

— Chad Rota, Records and Information Management Supervisor



Discover more about how Ricoh can optimize your enterprise content management system, visit [Laserfiche](#).  
To learn more about Ricoh’s (Progressive Aboriginal Relations) certification, visit [RicoH Programs](#).