

CASE STUDY: EUROPEAN HEALTH & FITNESS CLUB

REDUCING THE COST OF PROCESSING MEMBERSHIP APPLICATION FORMS

THE CUSTOMER

Customer X is one of Europe's largest health and fitness club operators with over 1 million members subscribed to their 400+ clubs. The company leads the UK's health & fitness club scene with more than 180 clubs currently in operation and new clubs being opened all the time.

THE NEED

Each month at clubs around the UK, existing and prospective members generate some 30-40,000 hand-completed forms. Under the old arrangement, the forms were keyed into the back office systems at the clubs before sending copies to an outsourcing company for scanning and storage so that the Member Services team at Head Office can retrieve digital copies when dealing with member enquiries. However, with membership levels set to increase the UK management team decided to explore the possibility of bringing the scanning and retrieval of forms back in-house to remove the high outsourcing cost and improve the process.

The company's goals were to:

- Automatically capture hand-written information from a variety of forms e.g. membership, privilege certificate and departure application forms then index and store for fast, simple retrieval
- Scan, index and store supplementary documents required for corporate membership
- Ensure that the system could, in the near future, provide Membership Consultants with a more efficient and convenient method of capturing data than manual keying

The ultimate success of this initiative relied upon its ease of use and rapid adoption.

THE SOLUTION

The chosen solution comprises three key elements; Formic Fusion^{PRO} data capture software, Invu document management system and Canon DR-7580C scanner.

Membership Consultants at each of the clubs continue to complete application forms and key the details directly into the back office system.



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The database at Head Office synchronises with the clubs each night, enabling the central Member Services team to view local club membership information the next working day.

Instead of sending hard copies of the forms to an outsourcing company, they are sent by courier to Head Office every Friday, arriving on Monday morning when processing begins. The team at Head Office check the forms against data held in the system to enable sales commission payments, check for the presence of signatures and also check that applicants satisfy the criteria for membership e.g. minimum age. All forms that require indexing and storing, including any supplementary documents and photocopied ID cards are sorted into batches of 100-200 pages and scanned.

A single operator processes approximately 1,500 forms each day, which includes the validation and correction of any poor quality information that Fusion^{PRO} does not instantly recognise.

Fusion^{PRO} feeds the extracted data and document images into the Invu document management system automatically overnight. Five members of the Finance team and 55 members of the Member Services team can instantly retrieve images of the members' original documents from other administration systems such as Sage by activating Invu's unique "Codefree" integration tool, which can perform searches using any of the displayed data fields.

Records from the Invu database are periodically exported to a Storage Area Network (SAN) drive to control the size of the live database.

THE RESULT

The company's daily forms processing requirement can now be managed by just one person with each form taking just a few seconds to scan, process, validate the data and store safely for retrieval at any time. Non-indexed documents containing machine printed text are retrieved just as quickly using Invu's powerful text search capabilities.

MAIN BENEFITS GAINED

- Initial solution investment recouped from cost savings after 6 months
- Improved customer service and response; images of application forms are available to the Member Services team within a few days of scanning, rather than weeks, negating the need to locate the original forms when dealing with early member enquiries
- Prospect of even greater efficiency gains by extending the system to Membership Consultants at all 180 clubs, eliminating manual data entry and improving sales effectiveness

CUSTOMER: European health & fitness club

INDUSTRY: Health & Fitness

APPLICATION: Membership Application Form Processing

CHALLENGE: Move an existing process back in-house without any disruption to existing work practices. Ensure ease of use and quick adoption

SOLUTION: Formic Fusion^{PRO} software, Invu document management system and Invu Application Programming Interface (API)

RESULTS: High return on investment (ROI), improved customer service response times and potential for further process improvements

In the future, the company plans to extend the solution to clubs so that sales personnel no longer have to key form information directly into local back office systems. Using Fusion^{PRO} to deploy the existing electronic forms to tablet PCs for completion in front of the customer promises the ideal solution.