

Replacing an Inefficient Manual Document System

Silicon Valley Bank 
A Member of SVB Financial Group

Silicon Valley Bank Prospers With Document Storage and Retrieval Unit

California-based Silicon Valley Bank (SVB) provides financial services to evolving and developed companies in technology, life science, premium wine markets and private equity. With 47 branches worldwide, SVB offers a variety of innovative services to entrepreneurial companies at any stage or size. Dedicated to supporting and growing businesses in a number of industries, SVB provides banking and investment services with an innovative and experienced approach.

The Problem

Silicon Valley Bank's corporate headquarters is located in Santa Clara, California, where the paperwork load was immense. Loan and deposit documents for over 4,000 clients accumulated in paper files, and access to these files was limited to employees at headquarters only. When an employee at another branch required a file, a request was put in for the document to be found, copied and sent to them. With 75–100 requests a day, each taking up to 15 minutes to process, the amount of time wasted accessing these files was substantial. Employees at the Santa Clara branch were constantly interrupted and spent valuable time searching through filing cabinets and folders. Time zone differences also meant requests were periodically held up even longer. These delays and the inefficiency of their manual system affected their 1,200+ employees, as well as their customers.



Solution Requirements

Silicon Valley Bank aspired for client documents to be immediately available to all employees, regardless of their proximity to corporate headquarters. Quickly retrieving files would save staff time and increase productivity, while also promoting ecological friendliness. “We were trying to find a way to go green, and make all of our documentation easily accessible,” said Ailesene Samatua, Ops Supervisor. A technical approach was pivotal, and moving paper electronically was undoubtedly a more up-to-date workflow solution.

 CAPTURE



Employees scan organization documents from multifunction copiers.

 INDEX / QA



PSIcapture provides for structured processing and capturing of document information.

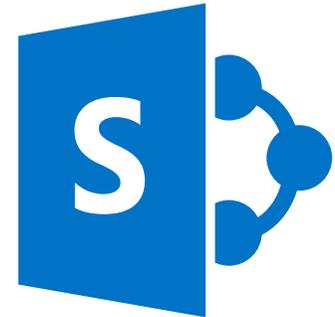
 MIGRATION



Documents are migrated into easily accessible multi-level folders in Microsoft SharePoint Document Libraries.

The PSIGEN Solution

To establish an automated workflow, SVB invested in two Konica Minolta scanner/copiers, Microsoft Office SharePoint Server and PSIGEN's PSICapture. Eliminating manual steps has made a tremendous impact on SVB and optimized their operations. Documents are scanned in, given a standardized name and published directly to SharePoint. By utilizing barcode separator sheets, PSICapture's flexible onramp creates document libraries and folders to further improve searches in SharePoint. "PSICapture has been a tremendous help to our bank. It has helped us with turnaround time for document requests, and also cut down on time-consuming projects," said Samatua. The product is powerful enough to process a multitude of documents in a brief timeframe, and employees at SVB branches worldwide have instant access to files. Processing documents electronically has not only freed the bank from superfluous paper-pushing and improved customer service, but has also promoted greener business practices.



Conclusion

By eliminating document retrieval requests, productivity has increased for all of Silicon Valley Bank's employees. Time previously devoted to manual filing and searching at corporate headquarters is now used on more productive tasks, facilitating significantly increased efficiency company-wide. Furthermore, thanks to PSICapture, SVB's customer service has improved by eliminating the lag time caused by waiting for a response.

Solution Components in Summary:

Capture Software:	2 PSIGEN PS capture Enterprise Workstations
Content Repository:	Microsoft SharePoint Server
Scanners:	2 Konica Minolta scanner/copiers