upland FileBound

Case Study

Nonprofit uses cloud-based workflow automation for accounts payable.

Volunteers of America

INDUSTRY
Nonprofit

COMPANY
Volunteers of America Southeast Louisiana
New Orleans, Louisiana
voasela.org

This nonprofit helps the most vulnerable and under-served people in southern Louisiana achieve their full potential. Common areas of focus include promoting self-sufficiency for the homeless and for others overcoming personal crises, caring for the elderly and disabled while fostering their independence, and supporting positive development for troubled and at-risk youth.

Volunteers of America Southeast Louisiana harnessed Upland Software's cloud-based workflow automation and document management solution, FileBound, to streamline its accounts payable processes, eliminate unnecessary paper documents, and empower staff with more time to help the community they serve.

How do you increase efficiency in an outdated accounts payable process?

The accounts payable clerk couldn't keep up with the increasing workload.

Volunteers of America Southeast Louisiana was growing quickly, and the burden on the AP clerk was increasing. The root of the issue was an outdated and inefficient AP system. The solo AP professional was bogged down with manual data entry, often requiring other staff to pitch in as much as 50 percent of their time to help.

With multiple offices, other problems that continued to arise were missing invoices or invoices that arrived at the wrong office and were then routed incorrectly. This resulted in recurring late fees and lost time tracking down delinquent paperwork via email threads and phone calls.

The nonprofit improved efficiency with FileBound workflow automation.

The streamlined AP process freed up staff to continue their mission of supporting more than 55,000 people in the community, and automation removed the need to hire additional staff, saving $40k annually.

AP saw a drastic reduction in invoice processing time, paper trail issues, and costs associated with check filing and copy materials. Costs for filing cabinets and paper storage are now obsolete and will be phased out as document retention mandates expire.

"FileBound empowered us to unburden our staff's days from manual time-consuming duties. Now they have more time for tasks that matter most for the community we serve. After all, we're here to help people, not to focus on paperwork."

– Lisa Wagnon
Administrative Management,
Volunteers of America
Southeast Louisiana

Cloud-based document management solution allowed quick, easy access to securely stored files.

Annual audit was a success thanks to easy access to documentation.

FileBound's solution also helped Volunteers of America Southeast Louisiana during an annual audit. Staff completed the audit with ease by reducing the time spent locating documentation. Electronic versions of POs, invoices, and checks were securely stored and easily accessed.

"We were able to quickly pull all invoices, check copies, and other documentation to get everything to auditors in record time," said Lisa Wagnon, Administrative Management.

Auditors were also given temporary, limited permissions so they could easily access and view documentation, greatly speeding along the audit process.

This nonprofit expanded its use of FileBound after seeing the efficiency and cost savings of automation.

Success with updating AP processes inspired this nonprofit to apply FileBound solutions to other areas.

For contract management, FileBound improved the review and approvals cycle and installed renewal reminders.

For human resources, FileBound digitized paper processes such as employee requisitions, change requests, and terminations.

By standardizing and automating these duties, staff can now focus on more value-centric work, rather than manual tasks.

Cloud-based services aligned with commitment to going paperless.

The benefits of cloud-based services also align with the nonprofit's commitment to going paperless. This strategic move is not only cost effective but is more ecologically sound, which aligns with their larger community-oriented purpose. At this point, paper storage and file cabinets have become obsolete, which has freed up office space and reduced staff burden.

"FileBound was key for us in moving to a more automated, paperless environment," remarked Wagnon. "FileBound is robust and reasonably priced, and they have delivered the results they presented from day one."

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.

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