Case Study

Stand Down provides faster assistance to at-risk veterans.

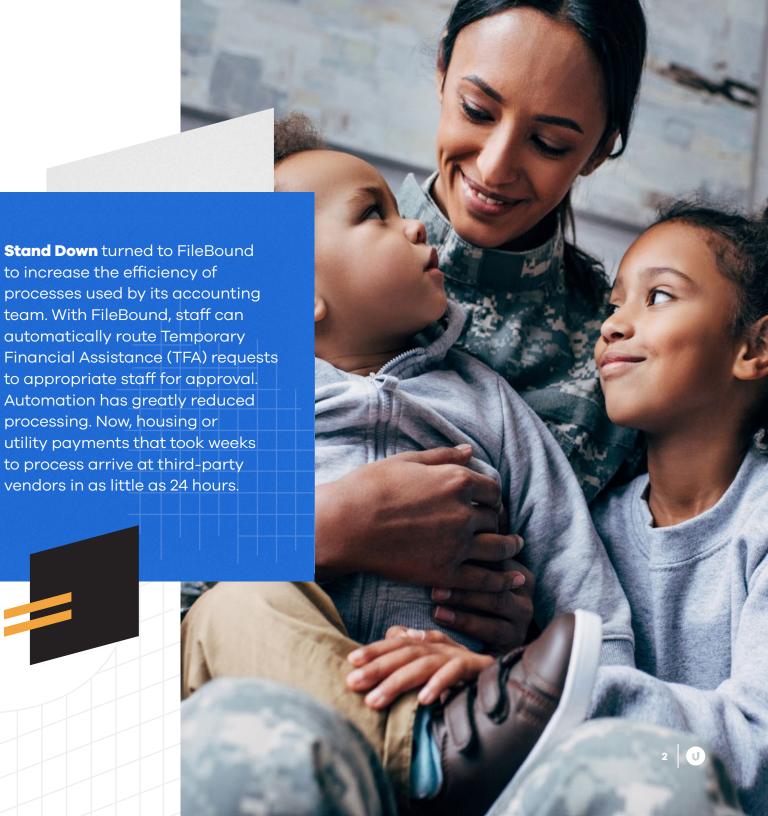STAND·DOWN

Stand Down turned to FileBound to increase the efficiency of processes used by its accounting team. With FileBound, staff can automatically route Temporary Financial Assistance (TFA) requests to appropriate staff for approval. Automation has greatly reduced processing. Now, housing or utility payments that took weeks to process arrive at third-party vendors in as little as 24 hours.

How can a lean team process urgent client requests more efficiently?

Stand Down staff were stretched thin.

This nonprofit's lean accounting team was working around the clock to manually process time-sensitive client requests. TFAs arrived at Stand Down as paper documents, then needed to be manually scanned and routed for approval, which could take weeks to help the clients they served. Stand Down needed a more streamlined way to achieve its mission.

Automation does the heavy lifting.

FileBound's comprehensive workflow capabilities replaced manual processes such as paper mail distribution or email threads for approvals with automated routing and action alerts. Now staff could focus their time on achieving their mission instead of printing, scanning, and tracking down physical paper documentation.

Stand Down saw a drastic reduction in client service times. Payment processing went from literally weeks to as little as one day. Staff can now review, approve, and process requested funds to third-party vendors including utility or housing providers within 24 hours of the request.

"FileBound has helped our busy team by leaps and bounds! Service time has gone from weeks to only a day or two for our clients, and it has certainly made life easier for our staff as well. Implementation was fast and the support experts are so helpful. The capabilities of the software has rescued us."

– Sarah Powers
Lead Case Manager, Stand Down

For this nonprofit, the results were clear—faster turnaround and more time for clients.

An ongoing success story.

With success in fulfilling TFA requests, the financial department is finding other ways to infuse FileBound into its processes to get more done.

Staff created an online financial assistance request form so that case managers can easily input information and attach supporting documents to the client file. Access to the form is available via the web, making daily tasks easier for office staff and those working remotely.

The nonprofit's staff members have also simplified their annual audit procedures along the way, since every document within FileBound is stored securely for easy recall.

Rather than being burdened by tedious paper processes or frustrated by approval bottlenecks, busy staff feel empowered by what they're achieving, and veterans and their families are getting the critical services they need more quickly.

Results for Stand Down

2 weeks
to implement

Paper-based, manual processes were quickly replaced with FileBound forms and workflows.

75+
TFA requests/week

The accounting team continues to grow its ability to quickly process urgent client requests.

24 hours
request to payment

Staff can review and process requested funds for third-party vendors in as little as one day.

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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