



AccuAccount Success Story

# Bank of Blue Valley: Imaging's Impact on Efficiency



**“AccuAccount is worth every penny.”**

- Janetta Kendrick, 1st Vice President, Loan Operations  
at Bank of Blue Valley

Since 1989, Bank of Blue Valley has served the lending and banking needs of the greater Kansas City area. During that time, the institution’s five locations have helped countless entrepreneurs and small businesses access the capital they need to get started, expand, build new facilities, and serve the community.

With commercial lending at the heart of the bank’s operations, the institution has continuously sought new ways to improve its loan management processes.

In this case study, we’ll explore how Bank of Blue Valley has leveraged AccuAccount to achieve this goal.

# The Need for a More Robust Loan Documentation System

Bank of Blue Valley is no stranger to software. In fact, when Janetta Kendrick, 1st Vice President, Loan Operations, came on board in 2000, the institution had already adopted a tickler system for organizing its exceptions.

“When I was hired, my goal was to help improve the organization of the loan operations department,” recalled Janetta. “Our existing tickler system offered exception tracking, but we also wanted to scan and organize documents in an electronic format. We knew that we needed a more robust system.”

The bank started its search for a more comprehensive application – one that offered both document imaging and exception management.

Of the many systems considered, one rose to the top of the list: AccuAccount.

**“Most of the other programs were very template-driven,” said Ms. Kendrick. “Alogent let us customize the look and feel of AccuAccount. Our goal was to make it easy for end users to find information. We therefore needed the flexibility to set up screens unique to our bank.”**

After careful consideration, Bank of Blue Valley decided to purchase AccuAccount in September 2006.

# Ramping Up AccuAccount

Shortly after the ink dried on the contracts, the institution moved into implementation.

“Starting in January 2007, all new documents were scanned as we received them,” recalled Janetta. “For our backlog, we set the goal of having everything scanned before 2008 arrived.”

Achieving this backlog scanning goal was certainly a team effort. The loan operations department put in extra hours, staying after work every Tuesday and Thursday during 2007. The team also came into the office every other Saturday morning. Even the lending department and certain credit support staff pitched in whenever they could. “We scanned our last file on December 31, 2007,” said Janetta. “It was a very fulfilling moment for everyone who contributed.”

# The Benefits of Paperless Loan Operations

Since going paperless, the bank's loan operations department has realized many tangible benefits. "Everything has been so wonderful since we moved off of paper," stated Ms. Kendrick. "For starters, we got rid of our file room. We also converted our file clerks to scanners, which provides our institution with even greater value from their time. From a risk standpoint, we're also in a much better position. Documents never get lost with AccuAccount."

Lenders also appreciate the convenience and accessibility offered by AccuAccount. "AccuAccount was designed to look like a traditional paper loan file, which makes it intuitive for our lenders to find what they need. All of the loan files are at their fingertips, which has translated into better customer service," said Janetta.

Moving to an electronic imaging system has even streamlined the bank's audits. Auditors are provided terminals with read-only access to AccuAccount. Now, instead of printing or exporting audit files, auditors have everything they need to do their jobs. This has resulted in better audits and even allowed auditors to explore the possibility of doing "virtual" audits, which could yield additional savings in the future. "From every standpoint, AccuAccount saves us money and time," stated Ms. Kendrick. "Instead of wasting hours manually filing paper documents, we simply barcode and scan them. Everything automatically appears in the right place in AccuAccount. Our President even uses AccuAccount, and he thinks it's great."

# Better Exception Management

Bank of Blue Valley is also experiencing improved document tracking since switching to AccuAccount. By combining imaging and tracking into one system, the institution is able to visualize exceptions at the customer, account, or user level.

“Administrative assistants love AccuAccount because it makes their jobs easier,” mentioned Janetta. “Admins can quickly generate a list of outstanding issues for the lender to discuss with the customer. This helps us manage exceptions in a much more personalized manner.”

Recurring exception reports can also be created for executive management, lenders, or virtually any other staff members. Based on the user’s preferred settings, a daily or weekly report appears each morning. No more manual ticklers or pulling customized reports. Everything appears in a convenient email format like clockwork.

# Start Saving Time & Money with AccuAccount

For nearly a decade, Bank of Blue Valley has been reaping the benefits of integrated imaging and exception management. If your bank is still on the fence, consider these final words from Ms. Kendrick:

**“Think about the time and money your institution might be wasting on paper documents. Moving files from branch to branch is inefficient and creates unnecessary risk. A better approach is using a system like AccuAccount.**



Alogent provides proven, end-to-end payment processing, content management, digital banking, and loan origination technologies to financial institutions, currently including over 2,400 credit unions, community and regional banks, and some of the largest national and international institutions. Our solutions are versatile, scalable, user-friendly, and exceptionally stable. Because of our relentless focus on innovation, our clients consistently exceed their productivity, financial, and customer experience goals.

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