

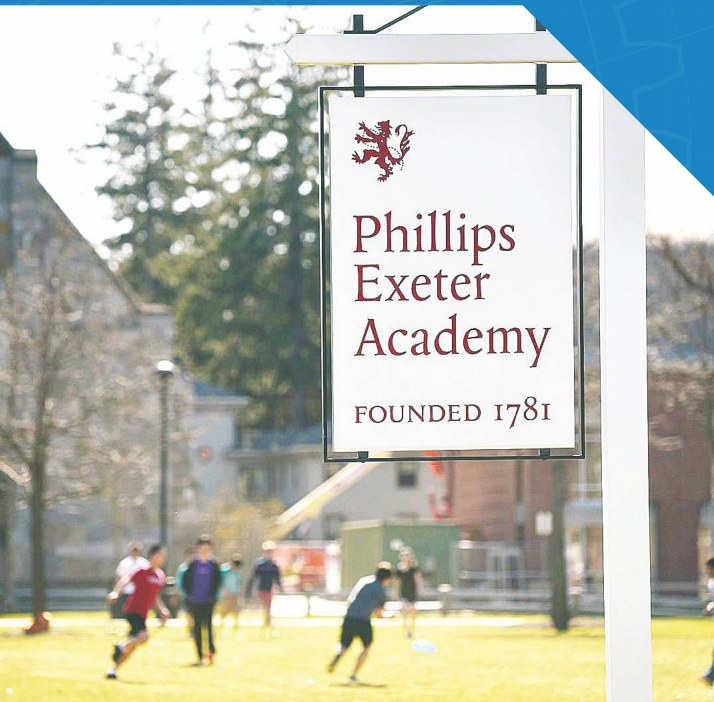


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# Case Study:

## Phillips Exeter Academy Implements Paperless Admissions with DocFinity ECM



**P**hillips Exeter Academy (PEA) is a prestigious boarding school with a rich tradition. Located in Exeter, New Hampshire, it's one of the oldest independent schools in the United States. Until recently, much of the school's processing was paper based. This created challenges related to efficiency, security, and staff morale. Phillips Exeter addressed these challenges with DocFinity, an imaging and enterprise content management (ECM) system that enabled them to go paperless in their Admissions department and create efficiencies throughout their campus. With DocFinity, PEA was able to:

- Minimize paper from the Admissions process
- Enhance security
- Support a mobile workforce
- Streamline applicant review processes
- Accelerate turnaround
- Improve operational efficiencies
- Pave the way to improved data analytics

Read on to learn more about Phillips Exeter's journey toward paperless processing, and their plans for the future.

### Background

Six years ago, PEA appointed Diane Fandrich to Director of Information Technology of the school. With a background in business operations and IT program management, Fandrich recognized early that Phillips Exeter was lagging behind the corporate world in their ability to process work efficiently.

She identified challenges that the school was facing with respect to document management:

Processing across the campus was paper based, contributing to delays, inefficient access, and accumulation of paper.

Files were moved physically from office to office.

The school had limited visibility with respect to where a document or file was within the system at any given time.

Staff did not have immediate access to the information that they needed in order to process work efficiently.

Paper based processing led to concerns about security and document integrity.

Admissions readers had to be physically on campus in order to view application materials.

Lisa Jennings, Assistant Director of Information Technology at Phillips Exeter, recalls, "We were a heavily paper-based campus. In Admissions, our application process was almost entirely paper-based. A few years ago we switched to an online application, but we had to print the images in order to be able to store and review them internally."

### A Better Way to Process Work

PEA uses Colleague by Ellucian – an ERP for the higher education market. Colleague addresses PEA's needs as a student information system; however, Fandrich acknowledged that Colleague did not offer the full functionality that the school needed to transition to electronic processing. She knew that an enterprise content management (ECM) system would enhance information access and accelerate processing. At the same time, it would improve transparency, governance, security, disaster recovery, and records management.

Christopher Glidden, the Admissions Operations Manager for Phillips Exeter, was looking for specific criteria in a prospective ECM system:

- **Ease of use.** The solution should have an intuitive flow, with drag and drop, point and click simplicity.
- **Ease of access.** The solution should offer the ability to connect both on campus and remotely.
- **Accelerated throughput.** The Reader Process should be able to handle 2300 - 3000 applications generated from 7000 inquiries per year.



- **Ability to manage multiple files per applicant.** The system should support, maintain, and manage multiple files from each student, including reports, essays, test scores, and associated documents.
- **Ease of retrieval.** Authorized staff should be able to access documents securely from any web browser.

Phillips Exeter Academy was looking at the project as a multi-year implementation. Admissions, including prospect management, would be targeted first, followed by College Counseling, the Alumni Office, and Administration. Within Administration, PEA identified HR, Finance and Accounting as areas that were ripe for enhancement.

## Going Paperless in Admissions

PEA chose DocFinity, which addressed their criteria for an ECM system and at the same time, could integrate

“This project has been a very positive experience for us. Everyone we have worked with has been eager to help, demonstrating a commitment to us as the customer, and willing to work with us to deliver what we need. I can say without hesitation that so far I am absolutely certain we made the right choice with DocFinity.”

— Christopher Glidden  
Admissions Operations Manager at PEA

with their Colleague SIS and their CollegeNET software. Feedback regarding the implementation has been positive. Jennings says, “DocFinity is saving a lot of unnecessary processing time. It’s giving people greater visibility. It’s cutting out wasteful steps. People are excited about the ability to gain better control over document retention and security.”

Now, PEA’s online application images come straight into DocFinity, allowing Phillips Exeter to skip the paper processing. The school uses electronic folders for applicants, which store all of the material associated with applications. They use DocFinity Workflow to manage the Read and Review process, which results in better visibility into where things are in the lifecycle, who has read application materials, and what needs action. DocFinity also provides better monitoring and visibility into the review process.

Fandrich says, “People have said that the process is much faster now. One person on the reading committee read five hundred applications, and he said he never would have been able to do that previously. Our Admissions Director read all three thousand applications. The feeling is that he would not have been able to do that if it was still paper based. DocFinity allowed us to change not only our Admissions process, but our culture. The fact that people can read applications remotely has been a tremendous improvement.”

Jennings visualizes scenarios for which workflow will be able to accelerate the Admissions process. She anticipates that the academy will be able to act on data to create rules-based routing of applications. She anticipates being able to automatically fast-track certain applications as well as automate routing of specific cases that might require specialty reviews.

## Expanding Efficiency Across the Campus

Phillips Exeter has expanded DocFinity’s electronic storage and retrieval functionality to other areas across their campus, including College Counseling

and Dean of Students. They use the software to support search and retrieval of the documents that initiated the Admissions Process, and to index additional documents. They hope to add Workflow as a second phase to their deployment.

PEA’s Summer School is also using DocFinity to improve operational efficiency. “Summer School and Admissions have similar functions, but they are completely different departments. Summer School works on a rolling admissions basis and DocFinity has allowed them to review and process applications more efficiently. As a result, they were able to fill the incoming class to capacity much earlier than in years past,” notes Jennings.

Additionally, PEA is using the software in their global initiatives group, which is a global travel program that uses specific travel-related documents related to safety and notifications. They are also beginning to use DocFinity to centralize accounts payable processes.

## The Secret to Success

Successful deployments are the product of a close working relationship between management, end users, and business analysts. Glidden has positive things to say about that relationship: “The DocFinity Business Analyst molded into our team seamlessly and has quickly gained the trust and respect of my entire team. That is no easy feat, given their mix of experience and tenure in their jobs. They are subject matter experts, and she has fit right in. I have worked with many technical representatives, and I can say that she is one of the best I have ever worked with. She is responsive, intelligent, thorough, friendly, and communicates well with end users.”

The improvements are sure to enhance the environment for staff, students, parents, and other stakeholders. Stay tuned as we explore future deployments across PEA’s campus.