

CLIENT SUCCESS STORY

Montgomery County Maryland Streamlines Administrative Work and Process



Just outside Washington D.C., Montgomery County is the most populous county in the state of Maryland. Home to , the history and culture. The county's legacy on-prem records management system made it difficult to streamline day-to-day business processes, impeding user efficiency.

Client

Montgomery County Maryland
www.montgomerycountymd.gov

Industry

Government

Montgomery County, which neighbors Washington, D.C., is the most populous county in the state of Maryland.

Streamlined Lending Process

KnowledgeLake has helped streamline the lending process by providing Tradition employees with powerful index and search capabilities. "In the past, when a loan document was received, it was printed and punched," says Carlson. "Then an employee would need to find the right folder in a sea of filing cabinets, open the folder to the correct section, and file the document. This process would take between five and six minutes.

Now, anyone involved in the loan process can upload a document to the system as soon as they receive it. The new process takes roughly 45 seconds to complete, and searches based on metadata are completed within seconds."

Secure Document Access From Anywhere

KnowledgeLake makes it easy for Tradition to provide document access to employees working outside corporate headquarters. "Prior to this solution, branch employees would have to wait a day for a file to be delivered by courier," says Carlson. "With KnowledgeLake, employees have instant access to documents from anywhere. The entire file is online, and documents can be looked up by any employee regardless of their location if they have the proper security. It allows our employees and our processes to be much more efficient."

Strengthened Data Security

Document security has also been strengthened since the days when Tradition stored paper documents in locked file cabinets. "We use Windows-based security to control who has access to documents," says Carlson. "Not only can we secure access to documents, but we can restrict access by document type. This is a huge benefit when we go through audits and regulatory exams because it enhances compliance with internal security policies and industry regulations."



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