



## White Paper



### Customer Vision:

Ensure brand integrity across all custom printed materials while reducing errors and driving costs down.

### Solution:

A web-based corporate e-Procurement site with a real-time WYSIWYG interface to allow entry and proofing of orders with direct transmission to suppliers and providing shipment tracking and customer service interfaces to field users.

### Results:

UMB realized an estimated 32.5% savings on custom printing of approximately \$2MM; achieved a rollout to 150+ branches and 500+ users and received a high user satisfaction response with fewer errors, Just-in-Time delivery, and uniform brand integrity.

### eProcurement Site Takes Off Quickly

“As system administrator, I have trained employees in 2 hours or less with great ease. Administration of the Company’s end users at 150+ branch offices has been quite simple, enabling system rollout in about 12 weeks.”

*Nancy Grasse, Senior Vice President  
& Director of Purchasing*

“Even our most inexperienced computer users have found the system to be very intuitive and easy to use.”

*Lyn Heermann, Vice-President &  
Assistant Director of Purchasing*

## TechForms® Procurement Site Case Study Submitted by: UMB Financial Corporation (UMB Bank)

### Background

Over the years, UMB Bank had developed a strategy to move purchasing to a more automated and efficient process. Their first initiative was to allow users to order standard office supplies and consumable items on an online system. The existing portal offered online access to a number of suppliers with a variety of goods and services. However, this system could not properly facilitate ordering of personalized and custom imprinted materials for UMB Bank.

### The Customer’s Vision

“The ideal environment would need to offer the ability to work with multiple preferred print suppliers who would print, warehouse (inventory), and ship to branch locations all custom-printed materials. Additionally, the system needed to allow end users to easily enter and proof their own orders in a WYSIWYG (What You See Is What You Get) manner, then transmit that exact copy to the supplier, and provide shipment tracking and customer service interfaces. It also needed to be flexible enough to add and delete products and add and change suppliers quickly,” said Nancy Grasse, Senior Vice President and Director of Materials Management at UMB Bank.

Grasse’s division envisioned that the true benefits of the workflow automation and operational efficiency solution would be justified from the return on investment the project would achieve in real savings in the following areas:

- Reduction in Physical Inventory & Carrying Costs
- Inventory Management Savings
- Forms Obsolescence Costs
- Forms Management Costs
- Forms Consolidation
- Reduction in Printing Errors
- Customer Service & Tracking Costs
- Just-in-Time Delivery of Product

## The Challenge

Develop the best practice for managing custom printed materials purchases. The solution would provide for **centralized** control of all purchasing to follow the corporate buying rules, maintaining corporate brand integrity while providing for **decentralized** “ease of use” for end users at all UMB locations and for all of the varied suppliers. The solution would also have the ability to provide reports about history, current status and trends.

## The Solution

To provide a standardized process for purchasing custom printed materials from all locations, UMB Bank chose the TechForms® offering from eBiz Software Inc. TechForms® is a web-based corporate e-Procurement solution that utilizes the Microsoft® Server technologies as a Software as a Service (SaaS) framework. The TechForms® service allows real-time editing and proofing of business documents and provides secure and accurate transmission of requested information to a variety of print suppliers.

## The Results

“We estimate that on an annual basis this new procurement system saved the enterprise an estimated \$650K on \$2MM annual purchases volume,” said Grasse. Other benefits realized include:

- Custom Application built in only 6 months
- Rollout to 500+ end users and 150+ branch offices in about 12 weeks
- Employees trained in 2 hours or less with great ease
- User-friendly, a high user satisfaction rating
- New products can be added to the system in 10 minutes per item
- Changing suppliers on existing items is transparent to users, seamless to suppliers and instantaneous
- Brand integrity is maintained because product information is controlled by UMB Bank ensuring uniform information on all product

In addition to these internal benefits, UMB Bank is building stronger supplier relationships, reinforcing mutual trust through reliable and accurate information sharing. In summary, this eProcurement solution can result in cost reductions for the purchased items themselves, for the administration of 18K+ transactions annually, by eliminating unauthorized purchases, through reduction in cycle times, and through supply chain efficiencies (such as delivery accuracy and inventory management).

## About UMB Bank, N.A.

UMB Bank, N.A. is the lead bank and a subsidiary of UMB Financial Corporation, a financial holding company headquartered in Kansas City, Missouri., with assets of more than \$8 billion offering complete banking and related financial services to both individual and business customers. Its banking subsidiaries own and operate 150+ banking centers throughout Missouri, Illinois, Colorado, Kansas, Oklahoma, Nebraska and Arizona. Subsidiaries of the holding company include an investment services group based in Milwaukee, Wisconsin, a trust management company in South Dakota, and single-purpose companies that deal with brokerage services, consulting services and insurance.

## About eBiz Software, Inc.

Is Your Technology Working for You *or* Are You Working for Your Technology? Have you ever purchased a software package only to discover it does not integrate with your existing information system? Are you as automated as you could be? Our customers have experienced as much as a 25% or more savings in time and money with our total business solutions. Keeping your business running at peak productivity and efficiency has a lot to do with keeping your software, services, and hardware current.

At eBiz Software, our workflow solutions philosophy is firmly rooted in real world experience. With over six decades of collective experience in developing innovative and effective business solutions, our staff has grown up as corporate problem-solvers. We not only know what it is like to run the operations side of businesses; we have been in the trenches helping architect, design, develop and test real-world workflow solutions.

Combining business operations and IT experience, we provide our customers with the best options to fit their business workflow needs. And we take craftsman-style pride in knowing that we have provided our customer with a superior and successful solution to improve the “**predictable profitability**” of your company.