

South & Associates Meets Deadlines and Regulations with Workpoint™

South & Associates, P.C. is a full-service law firm with an emphasis on mortgage banking law. The firm provides legal services throughout Missouri and Kansas, helping more than 150 clients on thousands of foreclosures each year.

South & Associates Seeks a Comprehensive Solution

Since South & Associates focuses on mortgage law, foreclosures are a key component of its business. However, foreclosures can be tricky and complex. Each case is governed by a specific set of requirements and regulations; the business faces stiff fines and penalties if it violates any of these regulations. Furthermore, South & Associates does business in multiple states, which requires the firm to follow a different set of rules for each case.

To help meet these deadlines and requirements, South & Associates implemented a simple workflow system. This system provided file notes and a relational database of case information, but it wasn't the workflow solution the company had hoped for.

"At that time, workflow was handing a case file to another person," said Mike Doerfler, software architect and developer at South & Associates. "It was physically moving a file. The solution didn't provide tracking or a way to check the status of a particular file."

South & Associates' workflow application could not quickly access and verify information. Important details were falling through the cracks: Documentation was inaccurate, revisions didn't reflect the latest changes and cases were delayed. South & Associates ultimately needed a comprehensive business process management (BPM) solution.

South & Associates appointed Perry White, director of IT, to lead the BPM vendor evaluations. After months of research, White concluded that document-centric solutions did not fit the firm's vision. The company needed a more complete way to encapsulate its business processes. After several vendor presentations, South & Associates determined that Workpoint was the only product that offered the flexibility and open architecture the company required.

Workpoint Proves Its Case

Workpoint is a comprehensive BPM solution that can be embedded as a component or used as a standalone solution. South & Associates embedded Workpoint to support its day-to-day business operations. Workpoint tracks the status of each activity and proactively manages thousands of work tasks simultaneously. Workpoint also allows the firm to map end-to-end processes.

The solution can also evaluate South & Associates' cases and make decisions accordingly. For example, certain mortgage loans require the firm to take specific actions at various stages of the loan process. Workpoint ensures that these actions are accurately mapped and evaluated at each stage of the process. Workpoint also created large-volume boilerplate documents to help South & Associates comply with foreclosure legislation. Employees can still edit these documents when necessary or beneficial. Workpoint also allows the firm to maintain an accurate and current database of all work management statistics. South & Associates uses this data to determine workload, and to provide clients with reports that detail the level of accuracy and proficiency when executing foreclosures.

Workpoint also helps South & Associates meet deadlines and avoid delays and penalties. For example, foreclosure regulations require South & Associates to execute specific tasks and processes within a set timeframe. If the firm misses these deadlines, employees must put cases on hold and the firm receives stiff fines. However, with Workpoint, the firm can suspend or reactivate these processes. This type of exception processing enables the firm to expedite the foreclosure process effectively and cost efficiently.

torque (tôrk)

: a rotational force. *←an automobile engine delivers torque to the drive shaft→*; also : a measure of the effectiveness of such a force that consists of the product of the force and the perpendicular distance from the line of action of the force to the axis of rotation.

Workpoint has met all of our needs so well that it makes the buy-versus-build discussion that we have on occasion moot.

Perry White

Direct of IT, South & Associates

Looking Ahead

With Workpoint, South & Associates has optimized its processes and increased its bottom line. After implementing the solution, South & Associates saw its workflow system evolve into a management reporting tool that monitors work queues, provides statistics and offers tracking capabilities. Looking ahead, the firm plans to incorporate two new lines of business that will require additional Workpoint processes.

“Workpoint has met all of our needs so well that it makes the buy-versus-build discussion that we have on occasion moot,” White said. “Workpoint has given us a vision of how things should be. We wouldn’t even contemplate building that in-house.”

Workpoint: BPM with Torque

IT environments requiring high performance and high throughput need more than a standard BPM engine, they need a BPM engine with torque. Workpoint is world-class BPM that is differentiated from any other solution on the market today. To date, Workpoint is the only BPM solution with two native engines, offering both a native Microsoft® .NET version and a pure Java™ J2EE version. These interoperable engines, along with a component architecture provide maximum performance and scalability enabling organizations to seamlessly automate, manage and optimize dynamic, high volume business processes across the enterprise. With its powerful, stateless runtime engine, Workpoint is BPM that manages processes throughout the entire lifecycle. It’s BPM with torque.

About Workpoint LLC

Workpoint LLC provides world-class business process management to organizations across the globe spanning various industries, such as healthcare, insurance, manufacturing, banking and retail. Whether used as an embeddable component or as a standalone solution, we provide our customers with the technology to seamlessly automate, manage and optimize dynamic, high volume business processes across the enterprise. Workpoint LLC is a wholly-owned subsidiary of Planet Group, Inc.

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