

# Arbor Memorial: Digital Transformation

## OVERVIEW

Digitizing legacy paper records to assist Arbor Memorial in moving towards a fully digital environment improving customer service, increasing accessibility, ensuring compliance and reducing storage costs.

## ABOUT OUR CLIENT



Arbor Memorial Inc. is the largest privately-owned cemetery and funeral services provider in Canada. Founded in 1947, Arbor Memorial has a national network of park-like cemeteries, funeral homes and crematoria. Since its founding, the company has been proud to service thousands of Canadian families, offering innovative and highly-personalized ways to celebrate the lives of loved ones.

*Proceed to next pages for case study*

### Document Scanning Conversion Services for Decades of Paper Documents



Variety of Contracts + Specialized Documents

## The Challenge

Arbor Memorial is comprised of over 130 branches spread throughout eight provinces in Canada, which have accumulated large collections of paper documents over the years. The paper documents consist of a variety of contracts along with specialized documents such as Records of Death Cards, Lot Owner Cards, and Records of Entombment, among others.

After decades of legacy processes creating and archiving paper records, Arbor Memorial started to search for a scanning partner to assist the company in digitizing legacy records for historic purposes, as well as realizing the advantages of operating in a fully digital environment. Considering that the documents at issue are active business documents, Arbor Memorial required a digital transformation solution that would impact its day-to-day operations as minimally as possible.

## The Solution

Octacom was selected as the outsourced scanning partner to digitize paper documents for several branches. As well, Arbor Memorial chose to leverage Octacom's Odiss™ document management cloud-based archiving software to ensure immediate access to the digital documents once scanned. This, combined with Octacom's ability to accommodate urgent retrieval requests, ensured the least amount of disruption to the business users of the documents.



### DIGITAL TRANSFORMATION SOLUTION

The full end-to-end digital transformation solution provided by Octacom consisted of the following services:

- › Detailed and collaborative scoping process to ensure alignment of the various document types and document scanning requirements
- › Transportation management to coordinate the safe and secure transport of paper files to Octacom's scanning facility
- › Document preparation and sorting to remove staples/carbon pages, identifying misfiled documents, mounting small slips of paper, etc.
- › Digitization of the various formats, sizes and types of paper files to create searchable PDF records (leveraging Optical Character Resolution)
- › File indexing and output to Odiss™ to ensure complete digital records were correctly identified and easily searchable within the archive

## The Results

Octacom was able to leverage its years of expertise assisting clients in creating and executing digital transformation projects to work closely with Arbor Memorial to support the launch of a new digital era for the company, allowing it to:

- › Improve customer service with easily accessible and securely stored digital records
- › Increase searchability and transmissibility of documents internally
- › Ensure compliance with document retention requirements
- › Reduce the physical space required for paper record storage, and associated costs



**Easy and  
Secure Access**



**Searchable and  
Transmissible**



**Ensure Compliance**



**Reduce Physical  
Paper Storage**

## More Case Studies

Learn more about how our solutions and services have helped our clients.

### LAFARGE

Improved processes related to managing over a half million delivery tickets annually.

### AIR CANADA

Turn-key solution handles over 500,000 air waybills and 1.5 millions documents annually.

### SALVATION ARMY

Integrated their ERP solution to centralize and automate invoice processing.

### VOTORANTIM CIMENTOS

Improved processes related to storing and reproducing shipping waybills and tickets.

### ONTARIO POWER GENERATION

Created a custom Accounts Payable Automation solution to manage over 110,000 invoices.

### ESTÉE LAUDER COSMETICS

Eliminated manual process for retrieving, handling, filing and distribution of HR records.

### YORK REGIONAL POLICE

6,000 employee files effectively converted into secure digital images, indexed and uploaded.

### WORLDSOURCE FINANCIAL

Created a custom document management portal and workflow solution.

### VITALAIRE

Eliminated manual processes for tracking, filing and retrieval of paper-based POD documents.

### ROOTS OF EMPATHY

Survey capture and processing services for over 9,000 parents responding to the survey.

### MIDWIVES' CLINIC OF EAST YORK-DON MILLS

Provided document scanning services and secure cloud hosting of digital Patient Records.

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## ABOUT OCTACOM

Octacom is an enterprise software and services company focused on document and data management solutions. Founded in 1976 and headquartered in Richmond Hill, Ontario, Octacom specializes in document management and workflow automation software as well as document imaging services, and leverages its proprietary Odiss™ Document Management Software to provide a robust, secure and cost effective solution to clients globally across a wide range of industries.