


Efficiency and Adaptability are Key

*Are eForms and Automated Workflows the
Wrap-Around Solution You Need?*

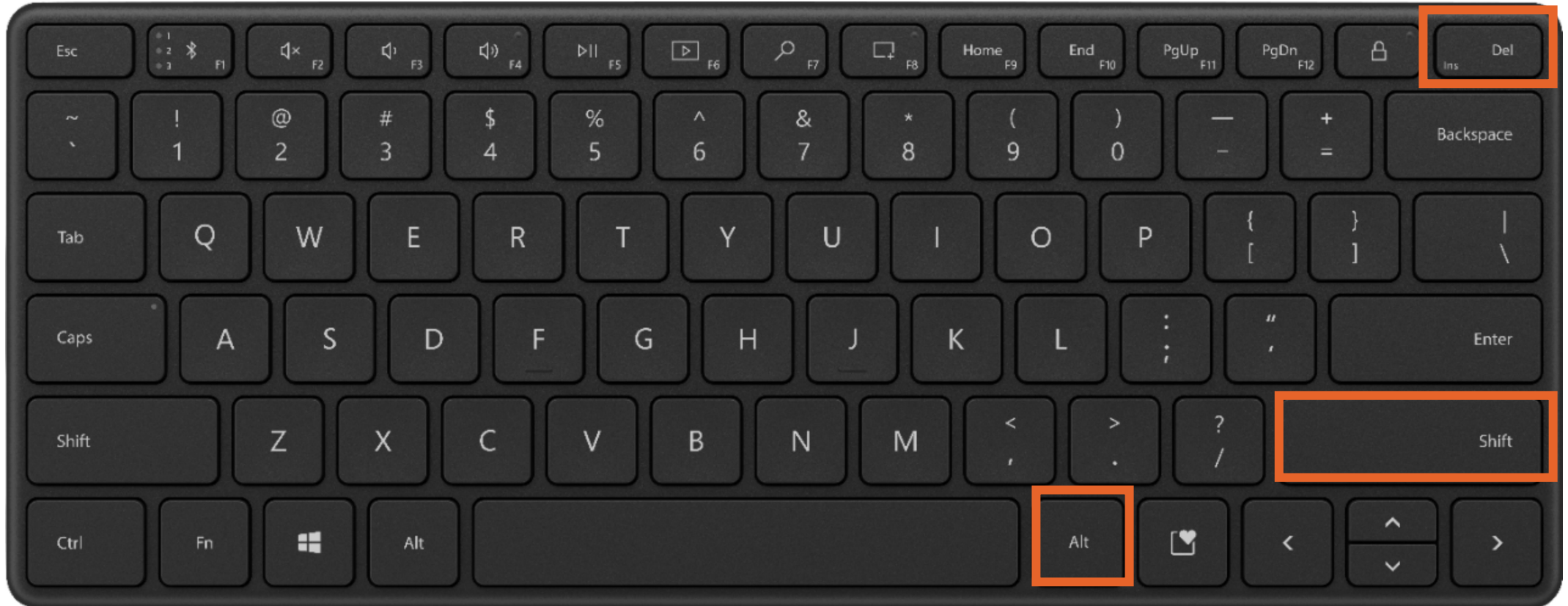
Chad Shrout
Account Executive I
Softdocs



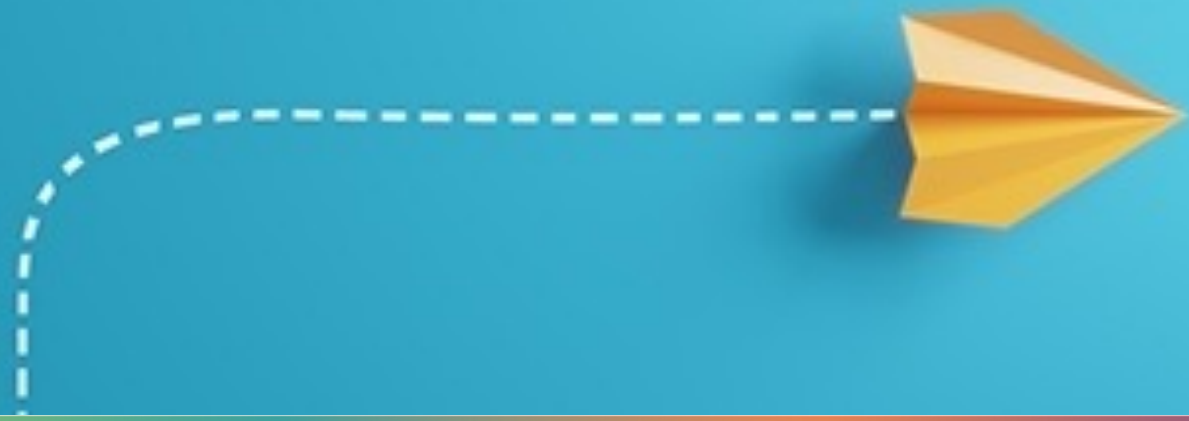
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- A person is sitting at a wooden desk, working on a laptop. Their right hand is holding a pencil over an open notebook. The background is softly blurred, showing a window with light coming through. An orange horizontal bar is located at the top left of the slide.
- Introductions
 - The Need for Transformation
 - Wrap-Around
 - Why Etrieve by Softdocs?
The Top 5 Reasons
 - Questions
-

Agenda

Which Key Are You?



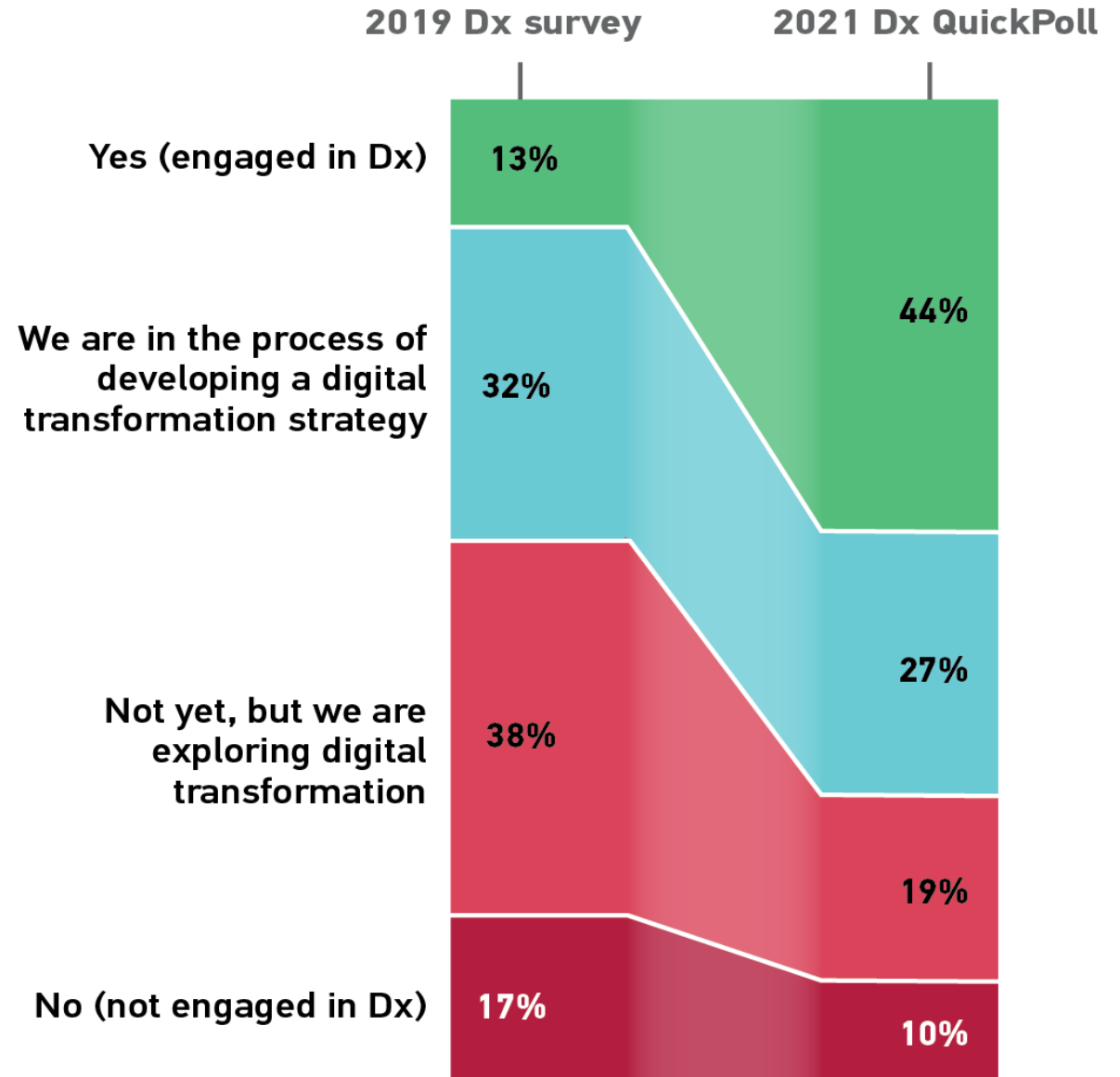
Digital and/or Operational Transformation



Would You Say Your Institution is Engaging in Digital Transformation Today?

(2019 and 2021)

Educause Review – Educause QuickPoll Results: Institutional Engagement in Digital Transformation. Aug. 6, 2021



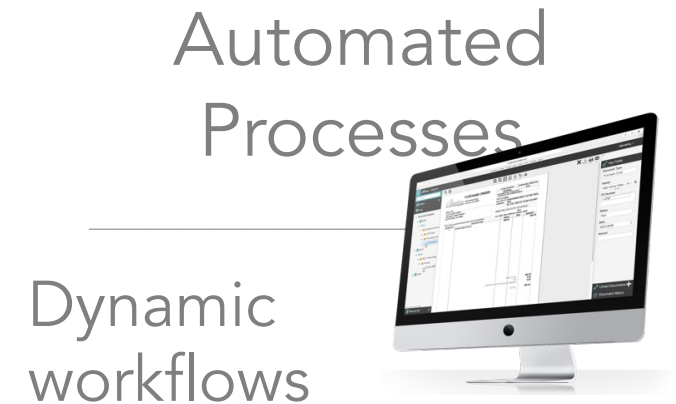


The needs and technology expectations of your students (faculty and staff, too) are evolving, but are your processes keeping pace?

The end goal:
Institutional Growth AND Student Success

The “Wrap-Around” Service:

Enterprise Content Management or Process Automation



A man in a dark suit jacket and black t-shirt is looking down at a smartphone in his right hand. He has a slight smile. The background is a blurred office hallway. The entire image is overlaid with a blue and green gradient that transitions from dark blue on the left to light green on the right.

Why Etrieve by Softdocs?

The “Wrap Around” Service

- **Etrieve Content**
 - Digital Document Repository
- **Etrieve Forms**
 - Enterprise wide and includes eSignatures
- **Etrieve Flow**
 - Dynamic Workflows



Reason #1: Streamline Processes

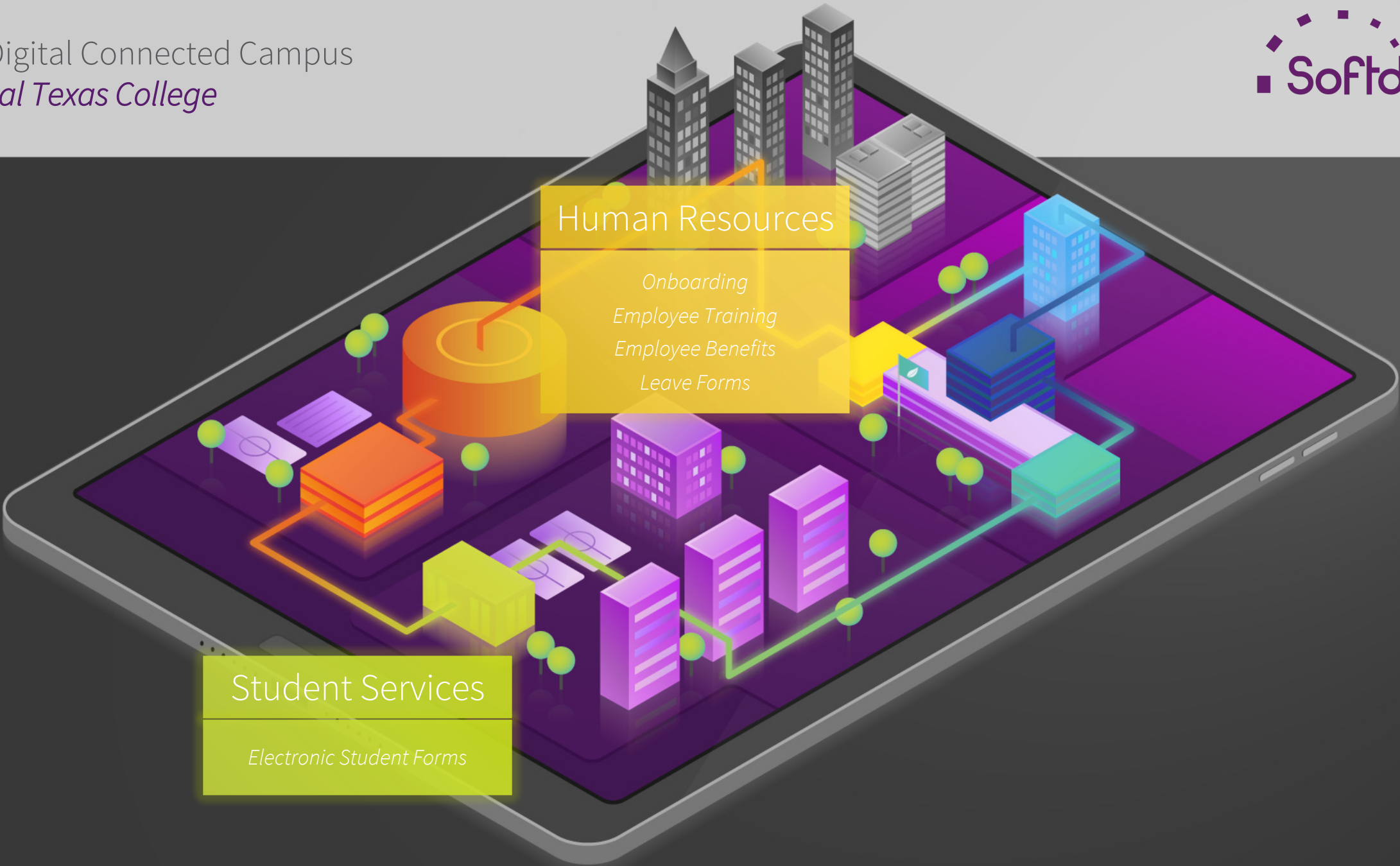
“We only have one person handling hundreds of athletic eligibility forms each year. Using Etrieve has greatly reduced the processing time and simplified the process for the athletic department, the student athletes and the parents. The students particularly love that they can complete the forms right from their phone.”

Alen Bahret | Programmer Analyst
Lane Community College

Reason #1: Streamline Processes

“We have become more streamlined in our onboarding, and are expanding across campus. And from what I understand, there is no other company out there that improves on such a consistent basis. That’s the partner we need and want.”

*Scott Wyman | Employee Training
Central Texas College*



Human Resources

- Onboarding
- Employee Training
- Employee Benefits
- Leave Forms

Student Services

- Electronic Student Forms

Reason #2: Enterprise-wide eSignatures, eForms, Automation

"Within six months, Etrieve was being utilized across 90% of campus."

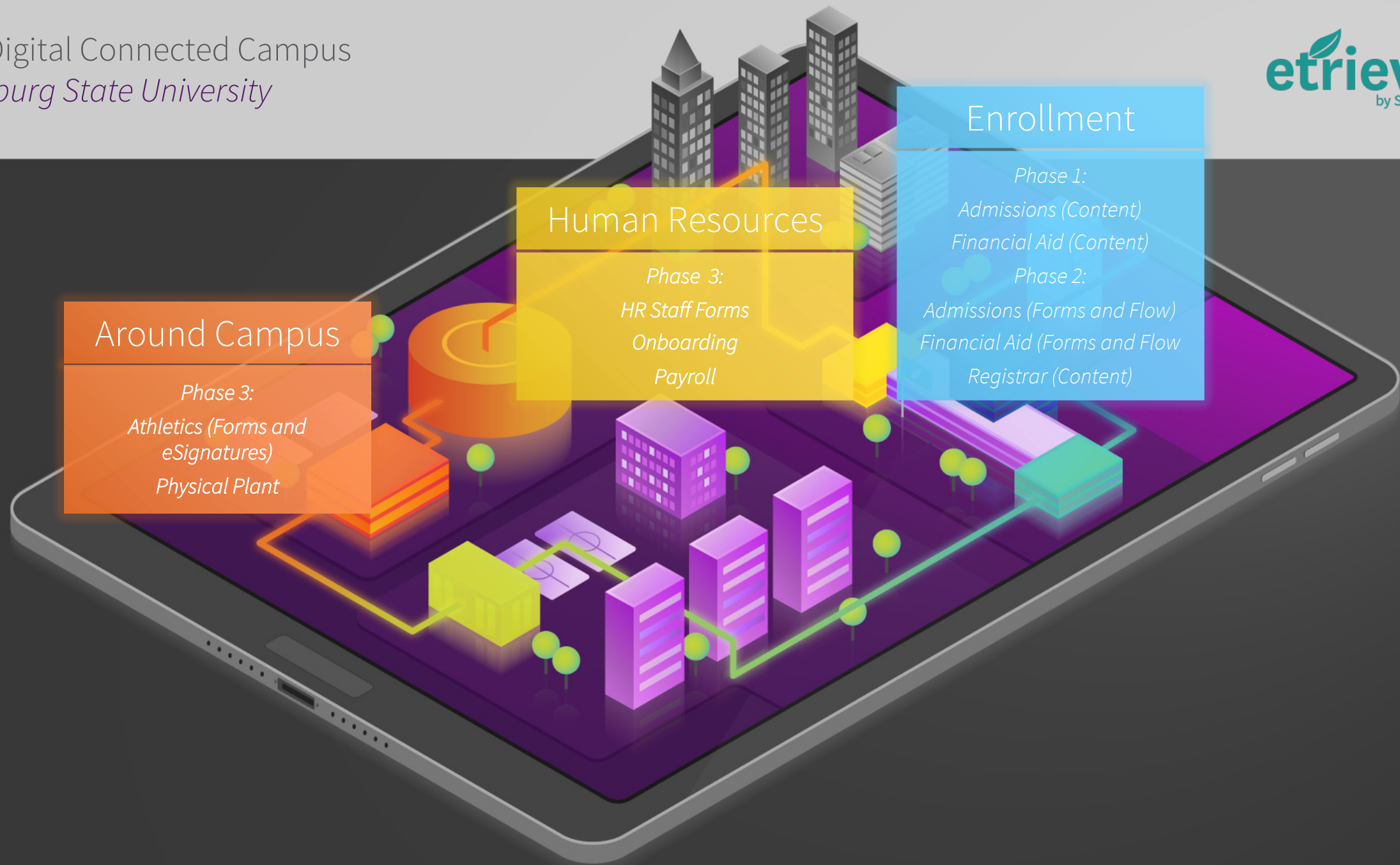
Dr. Candace Holder | FP Technology Services
Surry Community College

Reason #2: Enterprise-wide eSignatures, eForms, Automation

“Previously we had a forms solution that wasn’t as feature robust as we needed and an eSignature solution that was too expensive to scale. With Etrieve we gained a toolkit that enables us to cost-effectively replace both, while also providing the document management we needed.”

Tim Pelesky | Interim CIO
Frostburg State University





Around Campus

Phase 3:
Athletics (Forms and eSignatures)
Physical Plant

Human Resources

Phase 3:
HR Staff Forms
Onboarding
Payroll

Enrollment

Phase 1:
Admissions (Content)
Financial Aid (Content)

Phase 2:
Admissions (Forms and Flow)
Financial Aid (Forms and Flow)
Registrar (Content)

Reason #3: Easy to Use – for EVERYONE

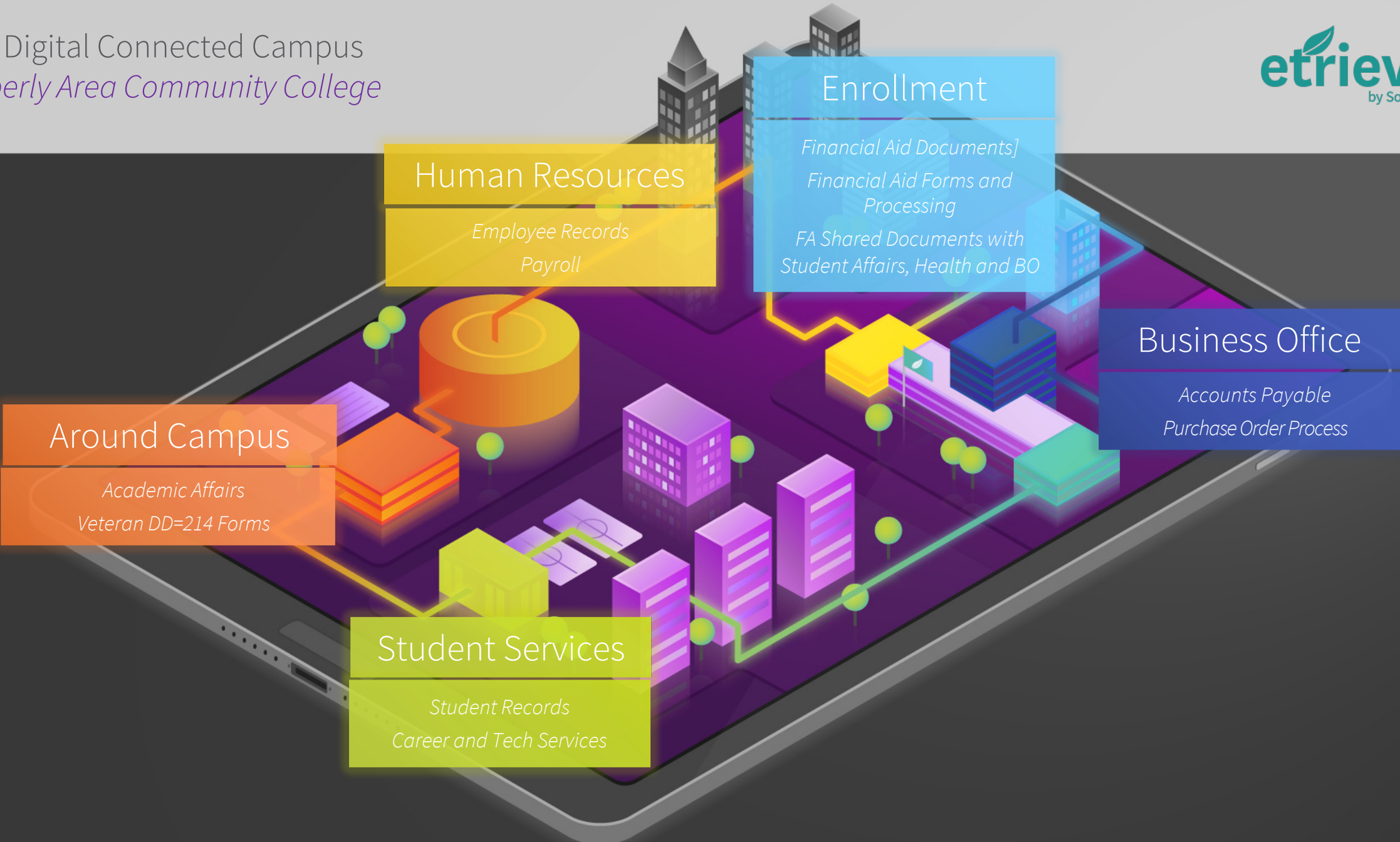
“The day that they went live, before I had even left the training, I get an email – ‘I love this!’ That’s the kind of experience that you want your end users to have.”

Laura Kappert | Director of Enterprise Services
Elon University

Reason # 4: Education Focus

“We really appreciated Softdocs’ education focus. The other solutions we evaluated seemed to have features that were unnecessary and/or too expensive. Etrieve was built specifically with our needs in mind.”

Russell Sigsworth | Director of Administrative Computing
Moberly Area Community College



Reason #5: A Team You Can Rely On

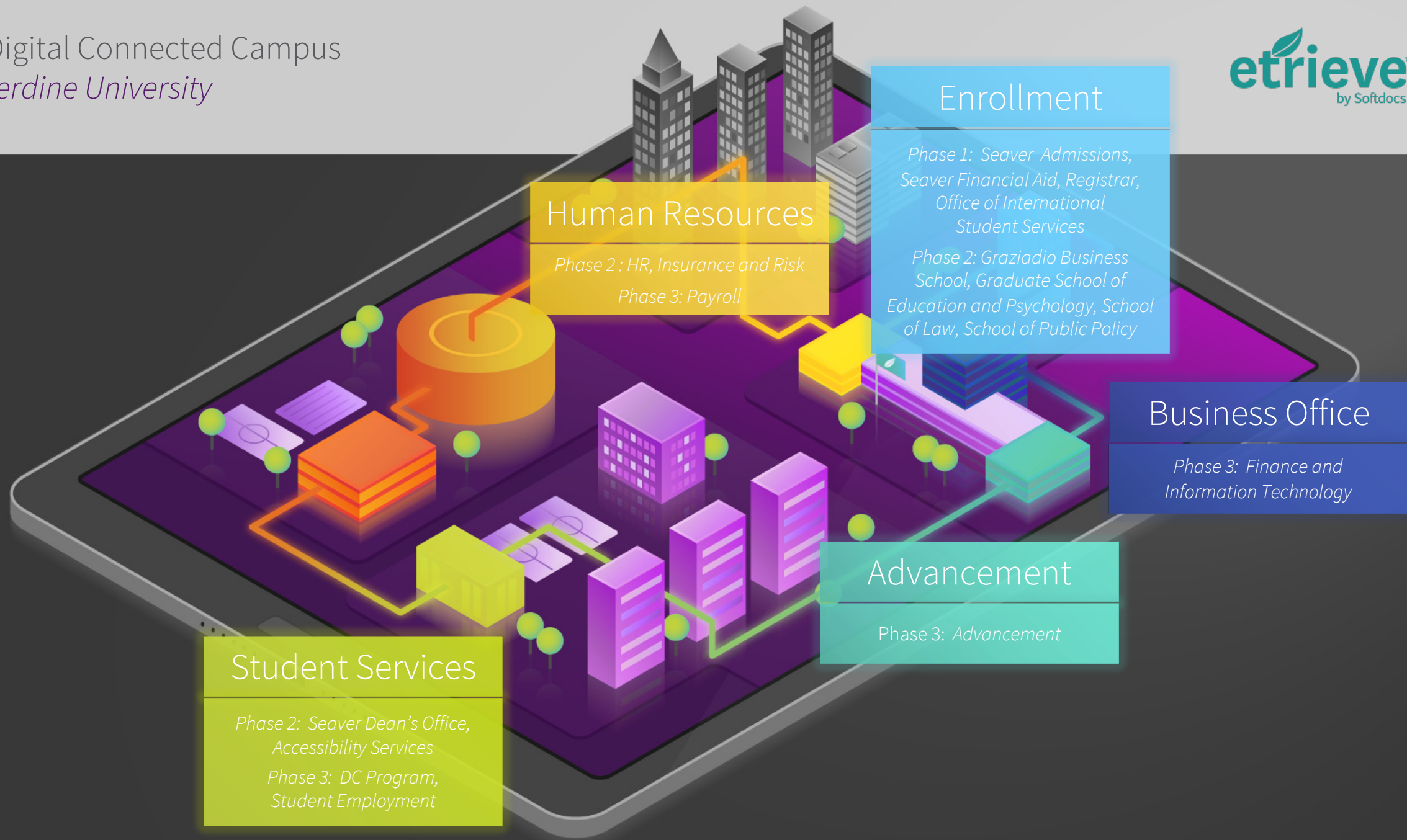
- ▶ Exclusively serving the education marketplace for over two decades with more than 700 customers
- ▶ Education customers range in size from 500 to over 80,000 students
- ▶ Proven track record of **successful migrations** and **unparalleled** professional services and **support**



Reason #5: A Team You Can Rely On

"We took a lot of time with Softdocs consultants ... They trained our admins on the back end, they gathered requirements from our users, they showed us how to configure Etrieve based on those requirements. And ultimately, they prepped our team to be able to do all these things on their own."

Reyn Oyadomorii | Manager, Institutional Support
Pepperdine University



Enrollment

Phase 1: Seaver Admissions, Seaver Financial Aid, Registrar, Office of International Student Services

Phase 2: Graziadio Business School, Graduate School of Education and Psychology, School of Law, School of Public Policy

Human Resources

Phase 2: HR, Insurance and Risk

Phase 3: Payroll

Business Office

Phase 3: Finance and Information Technology


Advancement

Phase 3: Advancement

Student Services

Phase 2: Seaver Dean's Office, Accessibility Services

Phase 3: DC Program, Student Employment



Etrieve by Softdocs
empowers Higher
Education leaders to
simplify key processes.

In other words ... we make your job EASIER.

Questions?

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softdocs.com/contact-us