

Contract Vehicles Limited (CVL)

Case Study



The Fleet is Flowing

Managing a fleet to be cost effective and resource efficient requires smart organizational structures. Contract Vehicles Limited (CVL) specialize in providing commercial vehicle contract hire and fleet management solutions for over 12,000 vehicles for high-profile customers in the UK and Ireland. With electronic document management, the company was able to drastically reduce their enormous paper volume and improve business processes to be faster, more transparent and customer-friendly.

Growth requires innovation. Contract Vehicles Limited (CVL), a leading provider of fleet management services in the UK, learned this lesson first-hand. Accompanying a period of rapid expansion, they had to figure out how to contend with issues like a huge spike in incoming A/P invoices; within only three years, the number of invoices which flowed into the office via post or email grew from about 30,000 to 100,000 each year. At the same time – to accommodate a growing fleet of vehicles – the number of inspection documents legally required by the British Vehicle and Operator Services Agency grew by a similar amount. According to IT Manager Geoff Swaby, it became increasingly clear that simply adding staff or expanding their paper archive would not accommodate all this growth. "In addition, numerous customers wanted to be able to access important documents at any time and from any location via the Internet," he explains.

Key business processes were therefore closely analyzed and it was determined that in order to meet their own performance and quality goals they would need to invest in a modern digital document management system.

Contract Vehicles Limited (CVL)

Industry:
Transport & Logistics

Location:
Leeds, West Yorkshire, Great Britain

Departments:
Accounting, Technical Administration

Document Types:
Incoming invoices, correspondence, digital documents incl. email, technical operating and maintenance documents

Requirements

In looking for a custom solution, a variety of systems from different providers were put under the microscope. They focused on four main criteria: the DMS should enable quick searches and processing of documents; a variety of document types and formats need to be handled and grouped together; digital documents should be accessible via the Internet; and the entire system must provide a secure, tamper-free environment for legal compliance. Aside from broad functionality and flexibility, another important factor was the ability to integrate smoothly into their existing IT infrastructure. Once DocuWare had demonstrated that it could fulfil all of these criteria, the solution was put through a thorough real life test. Geoff Swaby summarizes the outcome of this exercise: “The results completely confirmed our first impressions. DocuWare was able to prove its advantages in an impressive way. The document management solution is able to handle paper documents as well as digital documents such as email in a fast and transparent way. In addition, the flexibility and functionality of the system allows us to simply transfer analog business processes without disrupting our daily workflow.”



The Task

- Capturing and classifying analog and digital incoming invoices
- Workflows for invoice approval
- Digitizing of paper archives
- Implementation of a portal solution

The Solution

Their document management implementation started within the Purchasing department with the digital processing of incoming invoices. The invoices are either imported from Outlook or they are batch-scanned with the help of a high-performance document scanner. In both cases, the documents are automatically classified and relevant index information is transferred to the accounting system. The documents are then routed by various workflows to the responsible department heads for approval and release for payment. All steps of the workflows are constantly monitored so the individual status of each process is known. This allows them, e. g., to catch any delays which might endanger the benefit of early payment discount, since a notification email can be sent to each respective employee to nudge the process along. Because implementation in the Accounting department (which happened in 2013) was so successful, CVL decided to expand the solution in 2014. The goal was to include a file cabinet with about 80,000 (mainly) multi-page technical and maintenance documents. According to Geoff this presented a special challenge. “The big task was to bring the documents which were already scanned and stored in a separate file system into DocuWare – by automatically assigning them to the different customers.” As a next step, a portal for CVL customers was implemented. This portal allows the customer (if they have the necessary access rights) to review all relevant technical documents of their vehicles online.

Modules in Use:

- Active Import
- Import
- Connect to Outlook
- Task Manager

The Benefits

CVL is expanding faster than ever in its 20-year company history and DocuWare has played a critical part in helping them maintain and even increase their customer service levels. As Geoff explains, "The positive feedback from our customers demonstrates that they appreciate the expanded service offerings. They especially like the availability and ease of working with us." In addition, CVL employees benefit, since they do not have to leave their desks in order to retrieve and review documents. This translates into higher efficiency and shorter process times while increasing transparency. In addition, our former storage space can be used more economically.

The Benefits:

- Reducing paper
- Cost reduction through higher efficiency
- Faster processing
- Improved customer service
- Future-proof platform



CONTRACT HIRE • FLEET MANAGEMENT • LEASING

Summary

According to Geoff Swaby, one of the biggest advantages of DocuWare is its modularity and flexibility. "Thanks to the availability of numerous tools, it's easy to implement even more complex business processes." Geoff Swaby also praises the local DocuWare Partner who assisted them throughout the whole implementation process very competently. Due to the very positive experiences, CVL is already planning on expanding their DocuWare solution into additional departments.



"With DocuWare, we were able to replace paperbased, error-prone work through automated, digital processes. Employees and customers benefit at the same time through higher efficiency and improved service levels."

Geoff Swaby, IT-Manager, Contract Vehicles Limited (CVL), Leeds, West Yorkshire



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