Lee-Smith, Inc.

DocStar®

Commercial Truck Dealership Streamlines Operations Across Multiple Departments With DocStar Enterprise Content Management (ECM)

LEESMITH
FORD • INTERNATIONAL • ISUZU

Company Facts

Overview
- ▶ Location: Chattanooga, Tennessee
- ▶ Industry: Automotive
- ▶ Specialty: Commercial Truck Dealership
- ▶ Number of Locations: 8
- ▶ Website: www.lee-smith.com

Success Highlights

Challenges
- ▶ Expensive and inefficient document storage and retrieval
- ▶ Cumbersome and error-prone paperwork management

Solution
- ▶ DocStar® Enterprise Content Management (ECM)

Benefits
- ▶ Reduced costs and burden of paperwork
- ▶ Improved customer service
- ▶ Simplified documentation processes for employees
- ▶ Increased efficiency, productivity, security, and compliance
- ▶ Integrated documents with Karmak dealer management software

The challenge
Mountains of paper and lost time

Founded in 1939 as a family business in Chattanooga, Tennessee, Lee-Smith, Inc. has grown into the Southeast's largest locally owned commercial truck dealer for International, Ford, and Isuzu trucks.

Over three generations, Lee-Smith evolved from a store that sold and serviced farm tractors and equipment to a booming business with over 170 employees—selling, servicing, repairing, and leasing heavy-duty commercial trucks and motor coaches.

Lee-Smith recently celebrated their 75th year in business. Growing to 4 companies with 8 buildings on 60 acres, Lee-Smith had accumulated mountains of paperwork associated with every deal, every service procedure and every part or supply ordered. "Our primary problems were storage space and handling," commented Mark Graves, IT manager at Lee-Smith.

"We were spending too much time handling and shuffling documents—moving things from point A to point B to point C, each time increasing the probability of a contract or invoice being lost or misfiled. It was costing a lot just to manage all that paper."

The team needed a solution that was easy to use, could efficiently store both legacy and new documents, and could interface directly with their Karmak dealer management software.

"Karmak's willingness to work with DocStar ECM was at the top of our list of must-haves," said Jeff Berger, Vice President of Business Operations and Technology at Lee-Smith. "The fact that the DocStar solutions can integrate with Karmak Fusion and Karmak INFO5 will allow us to continually grow with both Karmak and DocStar well into the future."

> "We've eliminated at least 70% of our file cabinets and are working on at least another 20%. By the time we are done, we will virtually eliminate our paper storage costs and paper-related expenses."
>
> —Jeff Berger, VP Business Operations and Technology | Lee-Smith, Inc.

The solution
Scalable solution expands to new teams for even better return on investment

Lee-Smith selected DocStar ECM and DocStar AP Automation, with an integration to their existing dealer management systems for an even better return on investment.

Integration creates a seamless connection between the two systems, adding to further productivity and cost savings. "A browser based user interface, including single sign-on is easily deployed across all workstations. The ability to read and leverage information from Karmak was key to the team at Lee-Smith as the integration will be critical for the company moving forward," noted David Hutt, solution engineer for DocStar.

"With Active Directory Integration (LDAP), Lee-Smith does not need to manage separate user IDs and passwords. They can access Karmak information like work orders, customer data and invoices without having to log into two different systems. As they move to Karmak Fusion DMS, there are some

advanced options we will explore to create even more efficiency."

With this new integrated solution in place, Lee-Smith has improved overall productivity for both staff and management, and the system has built-in flexibility to scale and add new functionality as needed. Employees across the company have found the software easy to use and have been eager to find new ways to expand and improve within their departments.

The results
Automated processes across the organization for greater efficiency and savings

The first challenge Lee-Smith tackled was moving piles of paper documents into DocStar ECM so that they could later be retrieved in real-time. "We have a warehouse full of documents—deal jackets, repair orders, invoices and contracts that were just sitting in file cabinets," said Berger.

"If a customer inquired about a work order, we had to hang up, go to the warehouse, locate the right file cabinet and documents. By the time we returned the call with the information, it could be hours or even days later."

Scanned paper files into DocStar ECM makes them easily indexed, searched and retrieved. The transition was daunting at first and not without its challenges. "Initially we chose to have people scan their own documents, and we discovered it took more time than we originally thought it would," added Mark Graves, IT manager.

"We designated one person to handle the bulk of the scanning and indexing as well as being the frontline DocStar expert and it dramatically streamlined the process."

By mapping out a matrix of document types for each file, the teams were able to capture and store the paper efficiently and continue to do so with legacy files today. "Last month we imported a total of 6,396 documents, and over 63,980 year to date," noted Berger.

Interaction with the DocStar support team has been a great experience. "From a technical standpoint, the response from their team has been outstanding. We always get a quick response with support calls and we love using the 'chat' option for immediate help," commented Graves. "We have eliminated at least 70% of our file cabinets and are working on at least another 20%. Anything that was in paper folders is now electronically stored and secured in DocStar ECM.

By the time we are done, we will have virtually eliminated all of our paper storage costs and paper-related expenses.

We have an entire warehouse full of paper that we are looking to transition to electronic documents in the system over the next seven years."

Accounts Payable gets smarter
The Accounts Payable department has also begun to streamlined accounting processes. Instead of having to log, copy and physically route invoices, approved invoices are scanned and stored in DocStar AP Automation. With the time savings in filing and later searching for invoices, employees' time can be spent on important tasks like quickly resolving customer inquiries.

Instant document retrieval for better customer service
With the majority of their paperwork now stored electronically, the team can easily access information on customers for faster, more efficient service with an easy Google-like search function.

"Now, instead of having to hang up the phone when a customer calls, we can search DocStar ECM by any number of fields like work order number, VIN or customer number and just pull it up right on the screen—turning what used to take hours into a minute—without having to leave the customer on the line or call them back," noted Berger.

"We can pull up the information and relay it immediately or simply email the document

as an attachment. Without spending time trying to locate the right file, our employees now have more time to focus on addressing the customer's concern."

Improved efficiency, security, and compliance

Lee-Smith is working with all departments to improve efficiencies across the entire organization. Kristin Young, Human Resources Manager for Lee-Smith, is now able to manage information for employee records and audits quickly and securely. "Before our company transitioned to DocStar ECM my office was wall to wall filing cabinets crammed full of personnel files," commented Young. They were overwhelming and even though locked, were not fully secure. Security and confidentiality are top priorities. Former and present employee information is always at our fingertips for effective compliance."

DocStar ECM automatically creates audit trails with the proper security settings. Documents that have been added to the database benefit from an

> "Going to paperless document storage with DocStar ECM for human resources was not only a timesaver but a lifesaver as well."
>
> —Kristin Young, PHR, SHRM-CP Human Resources Manager | Lee-Smith, Inc.

added layer of security that protects both sensitive financial and customer identity information.

Young observed, "You can't ask for a better partner during audits than DocStar ECM. Instead of pulling stacks of paper files, I simply export to our auditor's website—no wasted paper, no compromised security or lost documents. Previously an audit would require extensive time pulling individual files and documents, hoping that everything would be put back in the correct place."

She continued, "DocStar ECM has been a game changer for our Human Resources department. I couldn't dream of going back to piles of paper. Now with a few clicks of the

mouse, documents are exported with ease with no risk of losing information or, it falling into the wrong hands. The software is very intuitive—which means there is limited training required to get the software up and running. Going to paperless document storage with DocStar ECM for Human Resources was not only a timesaver but a lifesaver as well."

With people at every level using the solution— from HR, the service department, accounting and the executive team, there is great potential for additional workflow optimization to help with document management. "We have a large list of additional projects where we plan to use DocStar ECM and are very excited about shifting employees' time to more important tasks like quickly resolving customer inquiries.

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

DocStar®

Contact us for more information on DocStar products and services

📞 +1.888.362.7827 x2735   ✉ info@docstar.com   🌐 www.docstar.com