



DOCUMENT MANAGER PROVIDES DAIRY CREST CUSTOMER SERVICE CREAM

• Business Need

To automate its delivery documentation to handle 17,000 deliveries a week from 20 depots across the country

Improve the Speed and Security of Document Distribution

Sophisticated Archiving and Communication Traffic Management

Tailored to provide electronic reading of customer documentation, such as goods received notes

• The Solution

Infonic Document Manager

Document Manager's workflow functionality is used to actually manage the business process - making adjustments on the Dairy Crest systems and avoiding the need to print documents.

The system is currently being extended to include all of our generated invoice paperwork to be archived in the Document Manager system

• The Benefits

Advanced document access and Storage

Increased speed of Document Delivery

Saving on Office Space

Delivery documents are readily available across the business.

Automatic matching of paperwork removes the need for manual checking

Overview

Using Document Manager to reconcile Goods Received Notes and Proof of Delivery documents with sales invoices.

Dairy Crest, the UK's leading chilled dairy foods company: <http://www.dairycrest.co.uk> - is now using Infonic's Document manager and workflow system to automate its former paper-based delivery note procedures.

These were previously used in deliveries to customers throughout the country from 20 UK sites, involving over 17,000 delivery notes being issued every week.

The new Document Manager system - <http://www.infonic.com> - is automating the reconciliation of customers' Goods Received Notes with Dairy Crest's Proof of Delivery documents (PODs) - saving time, ensuring documents do not get lost, resolving customer queries more rapidly and improving cash flow.

As a result, Dairy Crest's financial department is gaining a firmer grip on its debtor list, is improving awareness of how it is meeting its own key performance indicator standards, and is able to provide enhanced customer service.

The Customer

Strongly focused on building leading positions in branded and added-value markets across the dairy sector and investing in technology and industry leading facilities to create competitive advantage, Dairy Crest has demonstrated rapid and profitable growth since its London SE float a decade ago.

The company operates in two divisions: Foods and Dairies. The Dairies division incorporates liquid products, household and ingredients. Altogether the company employs over 7,000 staff across 21 sites throughout the UK and Ireland.

The Challenge

Central to the business is an efficient and rapid delivery service - taking highly perishable dairy products to countless wholesale and retail outlets across the country. A key issue here is the reconciliation of customers' Goods Received Notes and the supplier's Delivery Notes - to ensure that a correct invoice can be raised that the customer will accept.

Anything that causes a mismatch between the two is likely to result in queries and delayed payment. Typically in such cases, a normal 30-day credit can be transformed into a 90-day debt, involving multiple phone calls, absorbing resource that is often out of all proportion to the amount involved, and frequently causing grave customer dissatisfaction.

Until recently, delivery documentation for Dairy Crest's 17,000 deliveries a week from 20 depots across the country was handled by a traditional, paper-based manual system. Drivers made their delivery and returned to their depots with the counterfoil of a form signed by the customer to confirm receipt. Mistakes, disputes, misunderstandings, lost documentation and anything else that might delay payment had to be resolved by accounts staff - over the phone, via fax - often taking an inordinate amount of resource, and always extending the payment time.

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• Why Infonic

Capture and index different types of documents

Centrally manage document storage, security and user permissions

Link documents and folders with existing systems

Provide secure access to folders and documents from existing systems and web browsers

Manage the flow of documents between staff, departments and other companies.

• Is It for you?

Capture & manage all document types

Scanning & indexing

Email archiving & management

Comprehensive search capabilities including full text searching

Checking in and checking out of documents

Named or concurrent user licensing

Integrated version control

Document searching via a web browser

The Solution

Having made the decision to automate the process, Dairy Crest embarked on the selection of a solution. "The process was very comprehensive," says Dairy Crest project manager Alan Goodall. "Eventually we narrowed it down to 10 prospective suppliers - meeting those who would be involved in implementation and visiting reference sites.

The decision to go with Infonic was a combination of demonstrated product, personalities and the quality of solution visible at the reference site offered".

"To be fair, there are many products in the market place which provide a basic archive and retrieval system – what was unique about Infonic was the enthusiasm and willingness to understand what we needed and then tailor the system to address those needs. This culture was evident from reference site visits where it was obvious that the Document Manager users were not working around a third party system, but that the system had become an integral part of their business".

"The Proof of Delivery process is very simple in principle, however with 17,000 deliveries being tracked every week from our factories and distribution centres to major customers, it is easy to lose track of paperwork which is relied upon to ensure our invoices are paid".

"Document Manager allows instant access by Customer Services and Credit Control of all paperwork relating to an order which allows issues to be quickly rectified. This provides a substantial cash flow boost to the business," says Goodall. "In addition, Infonic developed and tailored the system to provide electronic reading of customer documentation, such as goods received notes. This then allows the system to electronically compare what the customers say they receive on their systems, what our systems say we sent and if any alterations were noted on the paperwork at the time of delivery".

"This automatic matching of paperwork removes the need for manual checking and allows us to proactively address shortages before the invoice is even sent. The improved accuracy results in improved cashflow as invoices are less likely to be challenged. At the same time there is an improvement in customer satisfaction and customer good will".

Where discrepancies are identified, they are automatically flagged for action to investigate and amend the invoice. Other documents, including customer claims for damaged goods are also scanned into the relevant delivery folder.

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*Ian Goodall
IT Project Manager*

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Document Manager highlights the relevant deliveries to the appropriate customer service staff. The objective is to ensure that when the invoice is issued, it is correct and will not be contested by the customer. The system also ensures that all delivery documents are available across the business. If an invoice is challenged, authorised staff anywhere in the country - even when they are mobile - can search and retrieve an invoice online using a standard web browser.

"We are also considering extending the use of the system to incorporate incoming deliveries and invoices which would automatch raised purchase orders and again reduce the need for paper chases"

*Ian Goodall
IT Project Manager*

"We are currently extending the system to include all of our generated invoice paperwork to be archived in the Document Manager system which will allow instant access for Credit Control and Customer Services when dealing with issues. For example, a telephone enquiry would previously very likely have resulted in a paper chase. There would have been investigation and decision-making as to why issues were not picked up and how to resolve them".

"Often, this might take place over a period of days. With Document Manager we should be able to resolve the problem while the customer is on the telephone making the initial enquiry. We are also considering extending the use of the system to incorporate incoming deliveries and invoices which would auto-match raised purchase orders and again reduce the need for paper chases," says Goodall.

"Implementation took longer than anticipated, mainly due to us adopting an attitude of 'right first time', rather than 'get it out there' and then snagging. This resulted in a longer pilot than planned for, and more refining, development and change than originally envisaged. All through this process Infonic bent over backwards to assist and fit in with our business priorities and objectives - at times the process was frustrating when issues became non issues, while other problems appeared. This was a learning curve for Dairy Crest - and without a full-time dedicated project team it was inevitable that there would be resourcing issues for analysis and testing".

The Benefits

Currently Dairy Crest has around 20 scan users feeding the system, and another 50 users who use the output of the system for Customer Service or Credit Control function.

"The system has met the defined requirements - and more. It has been able to meet many new requirements and changes introduced as experience and understanding of the potential was recognised by key users. The areas where we have had most issues are in that of bespoke development which sits around the core product. Such issues have always been addressed in a timely and professional manner. On the whole we are delighted with the system," says Goodall.

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IT Project Manager*