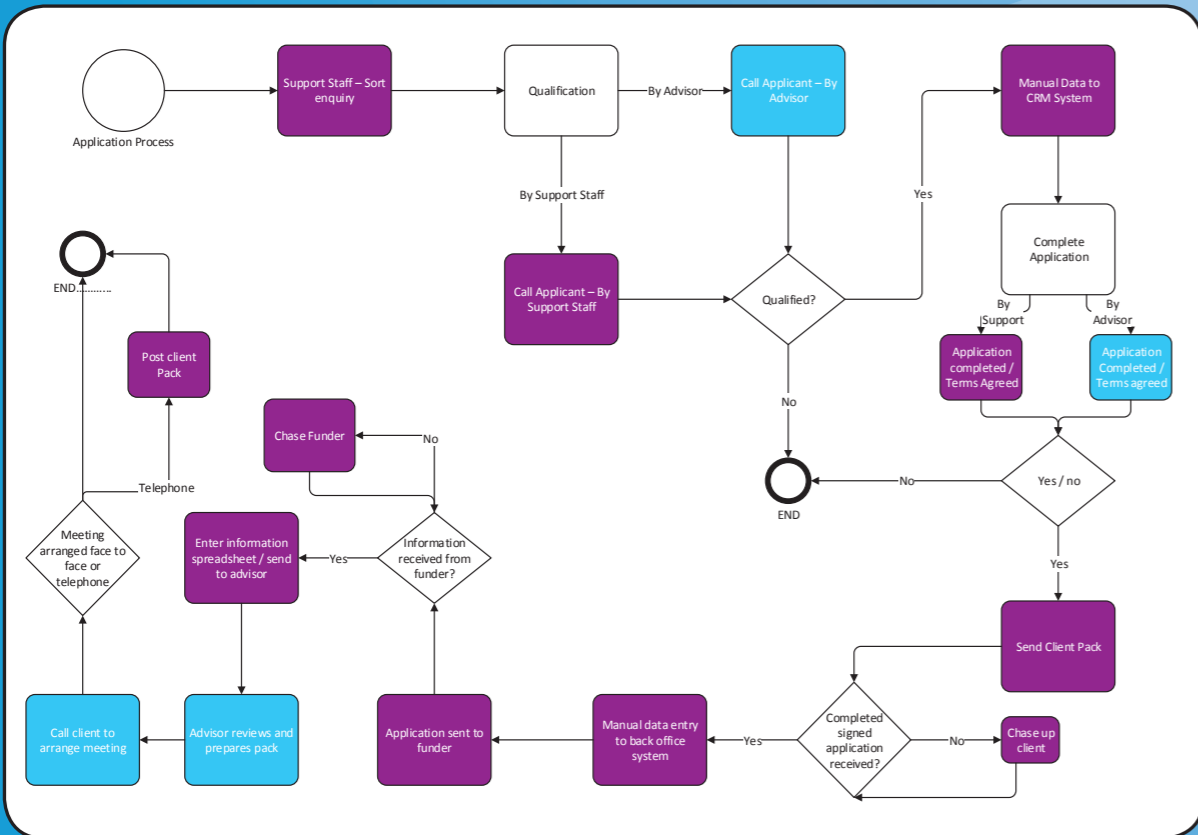# Creating efficient processes that save **time** and **money**

It's no longer simply about storing and routing documents. It's about giving users the ability to solve their own business problems and create better and more efficient processes within their organisation.
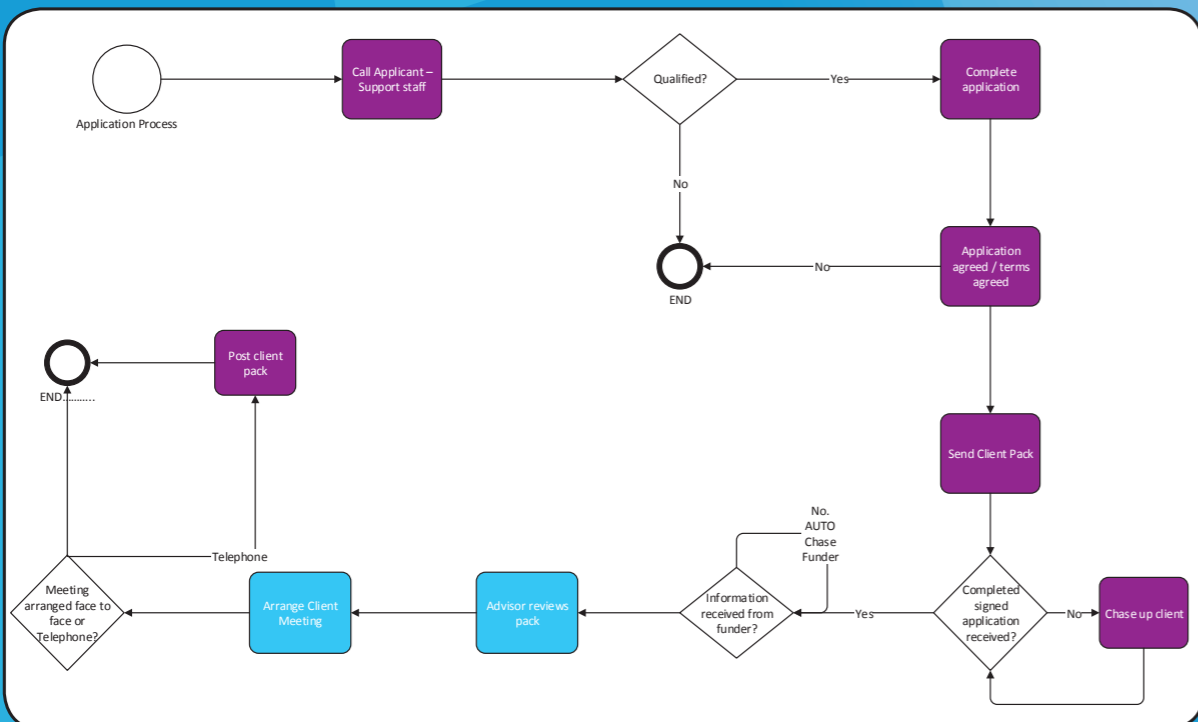
CONTRACT MANAGEMENT

- Track changes to contracts, who, what and when they were made
- Instantly locate contracts through intelligent search
- Automatically send contracts to authorised people and alert them to new tasks

Review and Approve
Business record
Contract Renewal

HUMAN RESOURCES

- Empower employees to perform straightforward HR task
- Secure information and support compliance throughout employee life cycle
- Speed up hiring process then link multiple documents associated with an individual
- Increase HR efficiency by eliminating manual, paper based tasks

Recruiting
Employee File Management
Employee Self Service

CUSTOMER SERVICE

- Collect statistics on how long a process takes and eliminate bottlenecks
- Automate and track tasks, identify people the process is waiting on
- Translate a complex process into a series of precise steps

Enquiry response
Customer satisfaction
Activity tracking

PROCUREMENT

- Gain visibility of all documents relating to received goods
- Predefined process steps and automated tasks to reduce follow-up times
- Track the progress of purchase order processes

Requisition approval
Manage tasks
Vendor selection

ACCOUNTING

- Fast track the submit, review and approve process
- Reduce manual processes and errors and Integrate with Accounts package
- Extract information from invoices and eliminate manual data entry

Expense Reporting
Accounts Payable
Accounts receivable

PAYROLL

- Manage all payroll related documents from tax forms to holiday requests
- Reduce time searching on RTI queries and reduce the risk of RTI penalties
- Predefined process steps and automated tasks to reduce follow-up times
- Reduce manual tasks and speed up processes
- Reduce impact of RTI through automated workflow

Confidential Information
RTI
Physical Storage

COLLATE
Business Systems Ltd

Flowchart (Process Above)

Application Process → Support Staff – Sort enquiry → Qualification → By Advisor → Call Applicant – By Advisor → Manual Data to CRM System → Complete Application

By Support Staff → Call Applicant – By Support Staff → Qualified?

Qualified? — Yes → Complete Application
Qualified? — No → END (Yes / no)

Complete Application → By Support → Application completed / Terms Agreed
Complete Application → By Advisor → Application Completed / Terms agreed

Yes / no — No → END
Yes / no — Yes → Send Client Pack

Send Client Pack → Completed signed application received?
Completed signed application received? — Yes → Manual data entry to back office system → Application sent to funder → Advisor reviews and prepares pack → Call client to arrange meeting
Completed signed application received? — No → Chase up client

Meeting arranged face to face or telephone → Enter information spreadsheet / send to advisor → Information received from funder? — Yes
Information received from funder? — No → Chase Funder

Chase Funder → Telephone → Post client Pack → END

Process summaries

⬆ **Process Above** – Process ran an average of 70 times per month with an average of 90 minutes per run at a cost of £60 per run – **Total cost to company per month £4200**

⬇ **Process Below** - Now with ECM deployed – Process runs an average of 70 times per month with an average of 50 minutes per run at a cost of £35 per run – **Total cost to company per month £2450**

💰 **Saving to company – £1750 per month while increasing capacity to run the process by 90% without increasing operating cost.**

Flowchart (Process Below)

Application Process → Call Applicant – Support staff → Qualified?
Qualified? — Yes → Complete application → Application agreed / terms agreed → Send Client Pack
Qualified? — No → END

Send Client Pack → Completed signed application received?
Completed signed application received? — Yes → Information received from funder?
Completed signed application received? — No → Chase up client
Information received from funder? — No. AUTO Chase Funder
Information received from funder? — Yes → Advisor reviews pack → Arrange Client Meeting → Meeting arranged face to face or Telephone? → Telephone → Post client pack → END

Our Content Management and Process Management tools enable our customers to tackle the information challenges in their business. Creating new levels of efficiency within their business processes and creating sustainable reduction in Time Cost, Storage Cost, Printing Cost and more

Our ECM tools and strategies speed and simplify the capture, processing, review and approval of documentation.

CAPTURE the information you need from paper and electronic documents, faxes, forms, e-mails and third-party databases and applications.

STORE and archive organizational content for long-term retention with DoD 5015.2-certified records management using archiving and distribution tools

AUTOMATE Resource-intensive processes by configuring workflows that perform specified actions at appropriate times, route documents to a specific user, send an email and exchange information with other business critical applications.

TRACK who a business process is waiting on, and collect statistics on how long it takes for each participant to complete their tasks.

DEFINE and report on an individual step in a business process

SEARCH for business processes by a variety of criteria and view information (such as step duration charts, resolution information, participant details, etc.) about a specific time a workflow ran.

RETRIEVE Instantly search and retrieve information in your office, on your mobile device or over the Internet using, indexing property/ metadata search, full text and advanced search

NEXT STEP Arrange an ECM assessment and find out how an effective Content and Process management strategy can get help you get more from your existing business applications, increase efficiency, reduce cost and get your people spending time on the things that really matter.

Contact: Greg Littlechild
Email: ECM@collate.co.uk
Tel: 01425 484700

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