

Client Success Story

A Paper-Intensive Business Finds Relief in Cloud Solution That Scales with Business Growth



Client Profile

FEATURED CLIENT
Transportation Services Provider

INDUSTRY
Transportation + Logistics

With operations spanning North America, a 2,000-truck fleet and 70 years of experience, this transportation services provider is a North American leader in the transportation and logistics industry.

“Being able to automate allows us to get from order to cash much more quickly. And then we’re able to take those employees and capitalize on their skills someplace else.”

– VP of Information Technology

As part of their digital transformation initiatives, this transportation services provider looked to migrate off of their legacy document management system. Before deploying KnowledgeLake, the organization was drowning in invoices, bills of lading, statements and HR and workers’ compensation documents that were spread across their organization.

BUSINESS NEEDS As a major transportation services provider, the organization’s business processes are very paper-intensive. The organization’s finance, HR and transportation safety departments constantly process invoices, bills of lading, freight bills, driver onboarding and workers’ compensation documents. Before KnowledgeLake, the manual workflow involved—keying in data, managing submissions and approvals and organizing documents in various systems—ate up precious human capital.

To complicate matters, the organization has been steadily growing with acquisitions. This not only led to a swelling volume of incoming and outgoing documents, but a growing number of disparate legacy document management systems to manage. Documents lived in multiple systems, which introduced unnecessary risk and cost.

SOLUTION The organization talked to KnowledgeLake about embracing a single, standardized platform that would automate document-intensive business processes and allow them to implement document retention policies without a painful rip and replace of existing business systems.

The organization now uses KnowledgeLake to automate the processing of invoices, freight bills and delivery receipts. Their HR department also uses it to automate the processing of employee onboarding, benefits and claims documents. Automating these high-touch, document-heavy processes has injected the organization's order-to-cash process with efficiency. It has also freed up employees previously saddled with this tedious, manual work.

"When drivers deliver freight, they have proof of delivery documents that have to be automated and oftentimes we're unable to bill our customers without that documentation," said the organization's VP of IT. "Automating that allows us to get from order to cash much more quickly. And then we're able to take those people and capitalize on their skills someplace else."

BENEFITS The KnowledgeLake Platform allowed the organization to move acquired organizations into a single IT environment. Since deploying the KnowledgeLake Platform, the organization has migrated nine million documents into the system, with 16 million documents expected to be migrated by the end of 2020.

"Since we are acquiring organizations and growing the way that we are, standardization is huge for us," noted their VP of IT. "KnowledgeLake has given us the ability to standardize our ECM model and capitalize on that, which is really pushing us forward."

As the organization grows, the KnowledgeLake Platform will scale to fit their needs. Its allowance for unlimited users enables them to add new departments and acquired organizations without buying additional user licenses.

"If we need some assistance around KnowledgeLake, or more generally as it relates to Azure, we can rely on the partnership we've established with them."

– VP of Information Technology



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