

## POBL GROUP CASE STUDY

Pobl Group is a not for profit group of companies that helps people find a great place to call home. They manage over 16,000 homes, the largest in Wales. They also offer a wide range of care and support services to help people live independently. Every year they invest in their customers homes and develop new, affordable homes, playing a key role in the regeneration of towns and cities across Wales.



### ANALYSIS

As Pobl continued to grow and work with increasing numbers of businesses, people and communities, their need to have the correct systems and workflows in place was paramount. Their on-going drive to streamline back-office tasks, incorporating automation, led them to investigate the possibilities and practicalities of automating and streamlining of their incoming documentation, including invoices. With YourDMS's experience with Document Management solutions and integration, they were the obvious choice.

Pobl were using both Invu Series 6 and Open Housing, but there was no integration between the two systems. With disparate document storage in use throughout the organisation, the need for a centralised repository of documents – available from multiple access points – became imperative.

The driving force behind these requirements was Pobl's desire for "Everything Everywhere" – the ability to access business documents and information quickly

"Before we worked with YourDMS, we were becoming more and more frustrated by a lack of control over our paperwork and invoices. We were wasting time searching for the right documents, we weren't able to process invoices quickly, and collaboration across departments was difficult. We knew we had to improve our processes and work more efficiently."

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and easily regardless of its origin or nature. In the long term, this would improve the service provided to customers and trading relationships with suppliers.

Pobl's finance department were receiving 1,500+ invoices every month. All transactions had to be manually entered into the accounts systems and matched to purchase orders. This was not only time consuming and labour intensive, but it was also prone to error. All paper invoices had to be manually scanned and filed in the Document Management system but in a separate area to the original purchase order, making the task of cross referencing the data more difficult than it should have been. This resulted in longer processing times, reducing payment control.

## YourDMS SOLUTION

After consultation and on-site analysis, YourDMS recommended the expansion of the existing InvuSeries6 document management system. This would incorporate all areas of the Housing environment including Property Development and Management, Planned and Reactive Repairs, Care Services, Customer Service, Applications, Tenancy Management. The seamless integration into the Capita OPENHousing system, would allow quick and easy retrieval and automated filing of documents. Employees have the ability to scan paper-based documents via networked devices, with data being captured and stored within the system. Back scanning of existing paper-based documents was also undertaken.

In one particular area, the finance department are also using automated workflows to automatically create transactions in the accounts systems and match to purchase orders. Any invoices without a PO are rejected and automatically emailed back to the supplier. Automated data entry has vastly reduced the amount of time spent processing invoices, automated data-matching eliminates errors, and all transactions are automatically filed in the Document Management system. This means that Pobl's staff have much more time to deal with the 'exceptions'.

YourDMS provided comprehensive on-site training, and the system is now being used by more than 200 people across the business.

## RESULT

Pobl has achieved an 'Everything Everywhere' culture throughout the business. The seamless integration of Invu, OPENHousing and their accounting software, means that staff from all departments can now search for and access files quickly, regardless of which system they were working in and which system created the document. This has greatly reduced the time spent in accessing business critical documents, and dramatically increased efficiency. In the Finance department, data capture workflows have ended the time consuming manual data entry and greatly reduced errors. Transactions are now processed automatically with little or no human intervention.

All of Pobl's documents are stored securely, meeting compliance regulations, resulting in improved control and monitoring of business critical information. With no need to store documents off-site, overheads have been reduced.

With the right systems now in place, Pobl can continue to grow and provide housing, care and support that transforms lives and strengthens Welsh communities, while offering their customers an efficient, high quality service.

"The changes that YourDMS have implemented for us have made a huge difference to the way we work! With our systems now integrated, it only takes a few seconds to find the document we need. And the improvements to our invoice approval processes, and the use of intelligent workflows, has allowed us to pay invoices much more promptly. All of which has improved productivity and saved money across the business."

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