Document Locator®

Case Study > Bob Lanphere Enterprises

> *We wondered, how difficult would it be to scan our car deals and get rid of the paper? We found out, with help from ColumbiaSoft, that it wasn't all that difficult. It was pretty easy to do.*
>
> **Robb Walther**
> **Chief Financial Officer**
> **Bob Lanphere Enterprises**

Critical Issue

Inability to find sales records quickly, and a growing volume of paper sales records were taking up too much office space.

Solution

An electronic document management system with scanning makes retrieval of sales records fast and easy. Access to files is secure, and records can be retrieved on-demand from all dealership locations. There's less risk of misplaced or lost documents, and more usable office space with fewer filing cabinets.

Software and Services

Document Locator
WebTools Module
ScanStation Module

Auto dealership conquers paper mountain

Back in 1964 when Bob Lanphere opened his first store, he sold only motorcycles and all sales transactions were paper based. Forty-three years later, Lanphere's once small company has grown into one of Oregon's largest and most successful automotive dealerships. In addition to motorcycles, Lanphere Enterprises sells cars, trucks, boats, and RVs. The company has nine dealerships and over 900 employees, and, until recently, mountains of paper records filling filing cabinets and clogging office hallways.

They finally had enough.

"Every piece of paper is a liability waiting to happen if it gets misfiled or lost," says Robb Walther, CFO of Lanphere Enterprises, "because by law, we have to keep financial records from three to five years, and we usually keep them for seven. And from looking at how we handled our paper, it became pretty evident that it was just totally out of control."

That's when he and his staff started talking about a scanning solution.

The search begins

In the Spring of 2006, Assistant Controller Lorena Dreyer, and Business Analyst Annie Mentzer, were charged with finding a scanning system. They had already looked at several companies when a Document Locator reseller happened to call, says Dreyer, and they agreed to look at some products.

The suggested solution was a scanner along with an enterprise document management system: Document Locator. This combination, Dreyer was assured, would not only help solve the paper storage problem but would provide the consistency, organization, and convenience they needed to better manage the sales transaction files that they needed to keep track of.

Using Document Locator, they could store everything in a central repository that the other dealerships in the company at other locations could access through a secure Web site using WebTools, an optional Document Locator module.

ColumbiaSoft™

Document Locator security would enable the other offices to deposit and retrieve information while preventing unauthorized access to Lanphere's files.

The test case

In July 2006, Lanphere decided to implement the system as a pilot project at their Honda/Infiniti dealership in Beaverton, Oregon.

"Everyone else was looking over their shoulder," explains Walther, and when the other dealerships saw how easy the system was to use and how effective it was, they wanted it too. So by February 2007, Lanphere was rolling out the Document Locator system to the entire corporation.

Alternatives considered

Lanphere did consider other options—one by ADP in particular because they had already purchased other ADP products and were happy with them. But, according to Walther, the Document Locator system was easier to use, faster, and less costly. So after narrowing the choices, Lanphere decided to go with Document Locator. "It was a great decision," Walther reflects.

Easy access, better organization, better security

When the scanning pilot project began, all 2006 sales records up to that point were being stored in a long row of over 20 file cabinets lining a long hallway. They started with those, scanning sales transactions and all related paper. They now scan all records going forward.

The benefits have been great. For example, when they've had audits in the past, it was a matter of handing over boxes of paper files to the auditors to go through. With Document Locator, it is easy to call up the electronic documents for the time period being examined. "The auditor was very impressed," Walther says.

Also, with the paper-only system, sometimes staff couldn't quickly find files, says Walther. "There's a huge difference between looking for a document and knowing that you can just go pull it out of Document Locator."

Dreyer attests to that. No longer do they have problems with misplaced files. There's no time spent re-filing documents, and they no longer have to worry about files being accessible to unauthorized personnel. Another plus: the Beaverton dealership has rid itself of the filing cabinets, and

the other dealership locations are seeing similar results. "The implementation of the scanning project exceeded my expectations," Dreyer says.

Improved customer service

Customer service quality has also benefited from the change to digital. About once a day, a customer calls wanting copies of documents related to their sale. Now Lanphere staff can find the needed information in a few minutes instead of spending hours or even days looking, as they have in the past.

Continued improvement

Lanphere is now using Document Locator to store and track HR files as well, says Walther, and they plan to extend their use of Document Locator to other departments.

Do they plan to back-scan all those records from previous years? Someday. "The volume of paper generated in this industry is just staggering, but at least we've stopped it from growing," he says, smiling.

They've done more than that. The metal file cabinets that used to line the hallway are a memory. There are now offices and cubicles where the file cabinets once stood.