

## Sapphire Case Study: CPM UK Ltd



"P.R.A.D.A is delivering exactly what the business needs – a secure, easy to use document management system that can be accessed real-time by our users - anywhere in the world". **Deena McIntyre, CPM UK**

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### CPM Conquer the Paper Mountain with P.R.A.D.A

CPM was established in the UK in 1936 to provide a portfolio of field marketing services that helps companies increase their brand presence within a global marketplace. With a UK workforce that is currently 3,000 strong, CPM deliver over 80,000 face-to-face, 100,000 phone and 20,000 web contacts for its clients each week, and is the UK and Europe's leading customer acquisition and management company. Globally, CPM has some 5,000 clients – a list that includes some of the world's largest household names and includes: Asda, Kellogg's, Nokia, Nike, Masterfoods, Cancer Research, Gillette and GlaxoSmithKline to name just a few!

CPM are part of the Omnicom Diversified Services Agency Group – an \$8bn industry giant that provides customer-driven marketing communications and services to help build clients' businesses.

As part of their business philosophy, CPM continually invests in technology that helps to keep their clients' businesses both successful and profitable. This philosophy is also adopted internally where the company is now working with an advanced electronic document management and workflow solution to help automate approval processes known internally as "P.R.A.D.A" (Paperless Retrieval Archive & Document Approval). CPM's aim for the P.R.A.D.A project was two-fold:

- To reduce the paper mountain that had built up within the business by establishing an easy-to-use document archive that could be accessed by all employees.
- To help meet the new disclosure and reporting requirements of Sarbanes Oxley – specifically to reduce risk and improve controls in the purchasing and accounts payable processes.

In addition, the new system needed to provide:

- The ability for authorisers to work from any location.
- The flexibility to specify a range of workflow.
- A reduction in re-keying data to improve accuracy.
- Automatic generation of email.
- Ease of use - with low IT and training overheads.
- A comprehensive audit trail to meet the requirements of Sarbanes Oxley.



Deena McIntyre, Systems Accountant in CPM's Finance Department and Project Manager for P.R.A.D.A explains "CPM already had an electronic document management system in place - but it wasn't meeting our needs in a number of key areas. Most importantly, CPM has



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a diverse workforce who work in very different ways. With P.R.A.D.A’s predecessor, our business units had to adjust the way they worked to suit the system - rather than having a system that supported the way they wanted to work. This made user acceptance difficult and ultimately meant that we weren’t getting the benefits we wanted.”

During the selection process, CPM reviewed several electronic document management and workflow solutions and ultimately selected Transaction Services Ltd’s (TSL’s) Document Management System. This was selected in conjunction with TSL’s specialist DOCLINK4 integration and workflow tools - which interface into the SunSystems finance application. Deena explains, “in addition to fulfilling our solution specific requirements, we also had to make sure that the relevant data could be easily imported into our SunSystems finance application.

During the selection phase a number of providers professed that they had this capability – but none, with the exception of TSL, were actually able to demonstrate this capability to our satisfaction. The fact that TSL had already delivered their solution to other businesses using SunSystems gave us added confidence. Furthermore, we discovered that TSL had a close working relationship with Sapphire – the organisation responsible for supporting our SunSystems application – and this partnership meant that we could further ensure that the integration project would be successful”.

The project to implement P.R.A.D.A began in July 2004 with a detailed scoping and specification exercise. The main issues were to agree the required invoice authorisation workflow allied with integration with SunSystems. With this in hand, the initial phase of the rollout to the finance department was completed, on schedule at the end of September 2004. During the implementation, CPM imported upwards of one million documents into P.R.A.D.A. Deena says “the transition was quite straightforward – TSL provided us with some templates which we used to import all the documents stored in our old system straight into P.R.A.D.A. Even during this implementation phase we found the system to be very robust, which allowed us to have the system up and running within such a short space of time”.

Deena continues: “P.R.A.D.A went live across the business in October 2004. We now have some 300 authorisers around the business happily using the system – all that’s required in terms of training is a 10 minute training session and they’re away. The feedback so far has been extremely encouraging - with our authorisers finding P.R.A.D.A flexible - and very easy to use. Each morning, P.R.A.D.A notifies authorisers, via email, of the documents that need their approval for that day – and all they need do to approve or reject these documents is two clicks of the mouse.”

P.R.A.D.A has also delivered a range of cost-saving benefits to CPM that includes tangible savings on paper, printing, postage and storage costs - together with a range of benefits that are much harder to quantify such as time savings and information accuracy. Deena tells us “our previous system had a significantly larger administration overhead due, in part, to the inflexible nature of the system. Not only did we need to give our users a much higher level of training and support but our IT team had to load the application onto each and every desktop. As P.R.A.D.A is web-based we no longer need IT to install the application and, as it is so intuitive, the training is absolutely minimal”.



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Deena says “as well as managing the invoice authorisation and approval process electronically, we now scan and store every imaginable document that touches the finance department – from purchase invoices and cheque requisitions to client contracts and sales invoices. In terms of legal documents and certificates these are also securely stored within P.R.A.D.A - thereby ensuring that they can be easily accessed for reference. In addition, Accountants within CPM can drill right back through from the source documents back to the underlying transaction details in SunSystems.”

Currently, CPM imports some 25,000 documents into P.R.A.D.A every month – with the scanners processing each document within seconds. For users, they can retrieve a document (no matter how old) within just a few seconds – and they can do this from anywhere with a web connection – whether that be at home, on the move or even in a hotel room. Deena states “With the advent of P.R.A.D.A, the web-based functionality now means that authorisations are no longer reliant on an individual to come into the office and complete the approval tasks. In addition, as documents no longer have to leave the department, the risk associated with losing documents is reduced”.

Audits and regulatory compliance is far easier too – CPM recently underwent an Inland Revenue and VAT Audit – a process which normally takes up to 10 days. Thanks to the easily referenceable audit trail provided by P.R.A.D.A, the Inland Revenue were able to complete their work within just a few days. Deena explains “Not only were we able to satisfy the requirements for the Inland Revenue quickly and easily but it’s helping us to comply with the requirements of Sarbanes-Oxley too. One of the key areas for compliance is the ability to provide a full historical audit trail for each financial document we process. From the very moment the document is scanned, P.R.A.D.A’s audit trail records each action taken on the document during the authorisation process – all of which is fully documented and traceable”.

As part of their overall IT Strategy, TSL worked with the internal IT team at CPM to ensure that P.R.A.D.A was fully integrated into their IT infrastructure. This included direct integration with the company’s recently deployed Active Directory system. As Jason Kane, CPM IT Infrastructure Manager says “This was a key integration for CPM, and was the first project to take advantage of integration into Active Directory - which is a key part of our strategy to ensure our IT systems are centrally authenticated and managed. Active Directory helps us to ensure that the user experience is improved as we move to a single username and password to access systems. TSL worked tirelessly with the internal IT team ensuring the system integrated smoothly and produced excellent test plans for modification to the system.”

Deena continues “For the future we have lots of ideas on how we want to build on this system and are very comfortable now using document management to store and retrieve documents and for invoice approval throughout the business. We are now looking at the possibilities of incorporating additional workflow to manage processes such as purchase approval and cheque requisitions. For anyone looking for an Electronic Document Management System we would certainly recommend that they talk to TSL about their requirements as, not only have we found their solution to be extremely flexible and easy-to-use, but we have found their experience, advice and willingness to support our needs to be of the highest level”.

Commenting on the implementation of P.R.A.D.A, Harriet Stapleton, CPM's Finance Director concludes "P.R.A.D.A is delivering exactly what the business needs – a secure, easy to use document management system that can be accessed realtime by our users - anywhere in the world. It's speeding up our authorisation processes, saving us money on paper and ancillary processing costs and helping us to meet the strict compliance regulatory controls of Sarbanes-Oxley".