

CASE STUDY**SOAVE ENTERPRISES****LOCATION**

Detroit, Michigan

INDUSTRY

Diversified Management and
Investment Conglomerate

INTELLICHIEF SOLUTION

IntelliChief Enterprise
Content Management
(ECM) for HR and AP

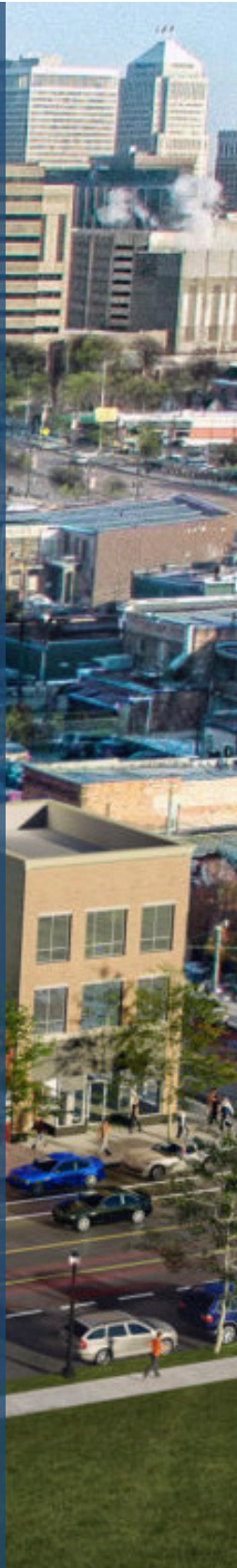


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COMPANY BACKGROUND

Founded in 1961 by Detroit native Anthony Soave, Soave Enterprises has grown to become one of the largest and most respected conglomerates in the United States.

Defined by its entrepreneurial culture, Soave Enterprises is comprised of a diverse set of 300-plus companies ranging from luxury condominiums along Florida's coast, to Kansas City-based Mercedes-Benz retailers and a master-planned residential community near Washington, D.C. Current holdings also encompass a prized collection of real estate investments, industrial services, and facility management companies, as well as hydroponic greenhouse operations.

BUSINESS CHALLENGES

AUTOMATING AND STREAMLINING PROCESSES

Soave's business relied on paper documents, particularly in Human Resources and Accounts Payable. Two major incidents prompted the company to reevaluate their processes and look for an Enterprise Content Management solution that seamlessly integrated with their JD Edwards World ERP system to automate and streamline the antiquated paper-based processes:

- A burst pipe flooded Soave's building in 2017, damaging 30 fireproof cabinets with important files going back several years.
- The COVID-19 pandemic forced employees to work remotely, making it difficult for employees to work efficiently with limited access to paper files outside of the office.

These two incidents drove Soave to consider solutions that would eliminate the business risk of relying on paper-based documents. With more than 300 operating companies under the Soave umbrella managed by their JD Edwards World system, Soave needed a software provider with a flexible solution to eliminate the paper load, customized to tightly integrate with JD Edwards and still support the unique nature of each of their diverse operating entities.





Streamline the Antiquated Paper-based Processes for Human Resources and Accounts Payable Departments

Soave will manage more than 100,000 HR documents utilizing six HR staff and almost 10,000 non-PO invoices (many multi-page). Handling that number of paper-based documents across so many operating companies was a cumbersome process at best before the flood in 2017 and the COVID-19 pandemic exposed the business risks of relying on paper for their internal business processes.

Relying on paper invoices during the pandemic made approvals difficult with multiple locations. Soave realized they needed a solution that allowed invoices to be quickly sent out for coding and approval, regardless of location.

The business risk exposure of relying on paper led Soave to research solution providers who were each able to offer a different level of customized solution to eliminate the paper for their HR and AP needs.

Soave chose IntelliChief for its ability to automate and streamline both processes by eliminating paper altogether and creating highly customized workflows to process HR and AP documents on a single platform that also allows Soave to automate other business processes in the future.

“We talked to three other companies and IntelliChief was the one that gave you the option to start small and grow into our system over time at our pace. A lot of other companies wanted to sell you the most extensive solution, whereas I said, ‘Hey, we’re still using file cabinets here and mail. How about we work into the full-blown solution and get there over time? We don’t have the staff or the bandwidth to do this all at once.’ IntelliChief listened, understood what our problems were and gave us options.”

- ANDREW TURNBULL

FINANCIAL SOFTWARE SPECIALIST AND PROJECT MANAGER

Executive Summary for Soave Enterprises

Soave Enterprises Operating Entities	300+ entities with real estate related operating companies, industrial services, environmental services groups, and more. <ul style="list-style-type: none">• Corporate accounting and real estate divisions account for 75% of their operating companies.
ERP System	Oracle JD Edwards World
Business Challenge	Increasing costs and inefficiencies in processing paper-based documents in Human Resources and Accounts Payable
Human Resources by the Numbers	<ul style="list-style-type: none">• 100,000 paper-based documents to be managed in the ECM archive solution• 6 people in HR
Accounts Payable by the Numbers	<ul style="list-style-type: none">• Invoices Processed per Year (~10,000)• 9 people in Accounts Payable – spread across locations: Ontario, Virginia, Florida, and Michigan• 8-10 days to process invoices for payment



BEFORE AND AFTER IMPLEMENTING INTELLICHIEF

One of the primary reasons Soave chose IntelliChief for its HR and AP automation projects was because IntelliChief offered a true ECM solution that provides a single platform on which Soave could standardize and automate HR and AP with room to grow in other business process areas.

Other key decision factors included:

- IntelliChief's JD Edwards integration expertise with both JDE World and EnterpriseOne.
- The scalability of the IntelliChief solution allows Soave to add users on an as-needed basis.
- The ability to phase in IntelliChief during each process.

Changes in processes and the benefits realized by Soave in HR and AP were significant, including the return on investment.

Before

Implementing IntelliChief

- Accounting processed non-PO invoices manually using paper
 - Invoices including utility and communication invoices (phone, electric, gas, water, etc.) would arrive in the mail for payment.
 - Invoices would be scanned and emailed for approval based on an internal list of authorized approvers.
 - Approvers would respond back via email.
 - AP would print out the response and attach it to the original paper bill to process it for payment.
 - The invoice – with attachments, approval emails and copies of checks – was stored in a file cabinet after the invoice was vouchered and paid.
- Work Order (contract) Invoices were manually matched by AP staff against a Master Services Agreement (MSA). Exceptions between the Work Order and the invoice, such as pricing differences and quantity mismatches against the MSA, were emailed/mailed to authorized approvers for their approval.
- Processing took an average of 8-10 days with significant delays in the approval process due to communication issues and a lack of visibility of which invoices were waiting for approval.

After

Implementing IntelliChief

- Invoices are scanned into IntelliChief and automatically routed for approval and tracked throughout the approval process with timers set for escalation should there be an approval delay.
- GL coding and voucher creation is a combination of manual processing and auto vouchering into JD Edwards World using IntelliChief with neither process requiring a physical copy of the paper invoice.
- Soave AP staff and management team utilize a dashboard to manage all AP activity. The dashboard shows the status of all invoice activity across the AP department, highlighting those invoices requiring attention allowing AP staff to easily identify and manage bottlenecks in the AP process.
- Greater efficiency in general in processing invoices for payment.
- Fewer delays in the invoice approval and exception handling processes due to implementing auto-escalation procedures within IntelliChief workflow.
- Significant increase in response time to vendor/supplier and internal management inquiries:
 - Questions about specific invoices no longer require a person to go into an office and pull it from a filing cabinet; they can simply retrieve the electronic invoice and supporting documents from JD Edwards World to instantly answer inquiries regardless of where the AP staff is located.

“It’s like the equivalent of having a folder of documents attached to the ERP. **Before they had to go either in a shared drop folder or a file cabinet, but now it just saves them a lot of time.**”

Andrew Turnbull
Business Process & Applications Manager

Before

Implementing IntelliChief

- 30 filing cabinets full of paper HR documents with no document retention policy
- Certain documents had multiple document receipt methods such as email, fax, U.S. mail
- 900+ active employee files, but turnover resulted in 200 additional multi-page and multi-document employee files per year, each with separate I9s
- Payroll scanning of documents to a shared drive without a consistent naming convention, making it difficult to find and match key HR records and documents within JD Edwards
- COVID-19 pandemic made it difficult to execute a work-from-home strategy as all paper files were on site

Soave in its own words:

“You know how in the '90s or '80s that people would have these mail carriers within a building? Our process was kind of like that,” said Andrew Turnbull, Business Process and Applications Manager at Soave.

“The HR department was struggling with the remote work situation, and we found that there was a lull and responsiveness with accounting approvals, so that was brought into the project scope. **I would imagine a lot of companies had the same problem that were highly dependent on paper documents prior to the pandemic. If you have documents only on paper, you don't back them up anywhere.** When it's gone, it's gone. You know you're liable for having a certain amount of history when it comes to employee documents. You don't think you need to worry about that until it happens.”

After

Implementing IntelliChief

- File cabinets went away as Human Resources eliminated paper-based HR documents. Electronically retaining about 100,000 employee files within IntelliChief.
- Document receipt methods (mail, fax and email) are automatically ingested into IntelliChief and connected to employee files in JD Edwards World.
- The increase in HR work activity related to employee turnover and attrition, particularly after the post-COVID shutdown, did not require an increase in additional HR staff.
- The HR team has been able to work more efficiently by seamlessly matching employee documents stored electronically in IntelliChief's secure document repository to employee records contained in JD Edwards.
- A historical record of employee files is now stored in the IntelliChief secure document repository for easy access by authorized users and naming convention discrepancies have been eliminated.
- A secure document retention policy based on internal policies and regulatory compliance has been developed and fully implemented.
- HR team members can conduct employee searches and pull up HR documents related to individual employees from JD Edwards World using employee ID.

“IntelliChief is like having their own disaster recovery restoration process that we have in place for our other data. It's our server. We apply the same logic to our IntelliChief documents. In the event a server would fail, we have backup and restoration capability.”

Andrew Turnbull
Business Process & Applications Manager

SELECTING **INTELLICHIEF** AS A SOFTWARE SOLUTION PARTNER

Converting paper documents into electronic documents and retaining them for easy and remote access was top priority for Soave, and the company wanted a solution that would not only address their current needs, but also be robust enough to roll out the solution one business process at a time and scale with the company as it grows.

Soave also wanted a solution that works with its JD Edwards World ERP system today and fit in with its internal plans to migrate its ERP to JD Edwards EnterpriseOne. So, it was important to Soave that the solution they selected today would easily migrate to its upgraded solution in the future.

With its requirement to choose a solution provider with both JD Edwards World and EnterpriseOne experience, Soave easily narrowed down the list of potential solution providers to only those that had a long history with JD Edwards.

With its deep JD Edwards integration experience and expertise and partnership approach to working with customers, IntelliChief really hit the mark for Soave.

“Software partnerships really need to be looked at as a long-term relationship, and with document retention, AP Automation, and all the offerings IntelliChief has, you want to pick the right partner that you can see yourself being with for 10-plus years. Moving around and changing systems is a headache, and it’s a project in itself that requires you to bring on another vendor.

We wanted to partner with someone that had familiarity with both JD Edwards World and JD Edwards EnterpriseOne and had a process laid out when we were going to migrate our ERP”

– Andrew Turnbull,
Business Process
and Applications Manager

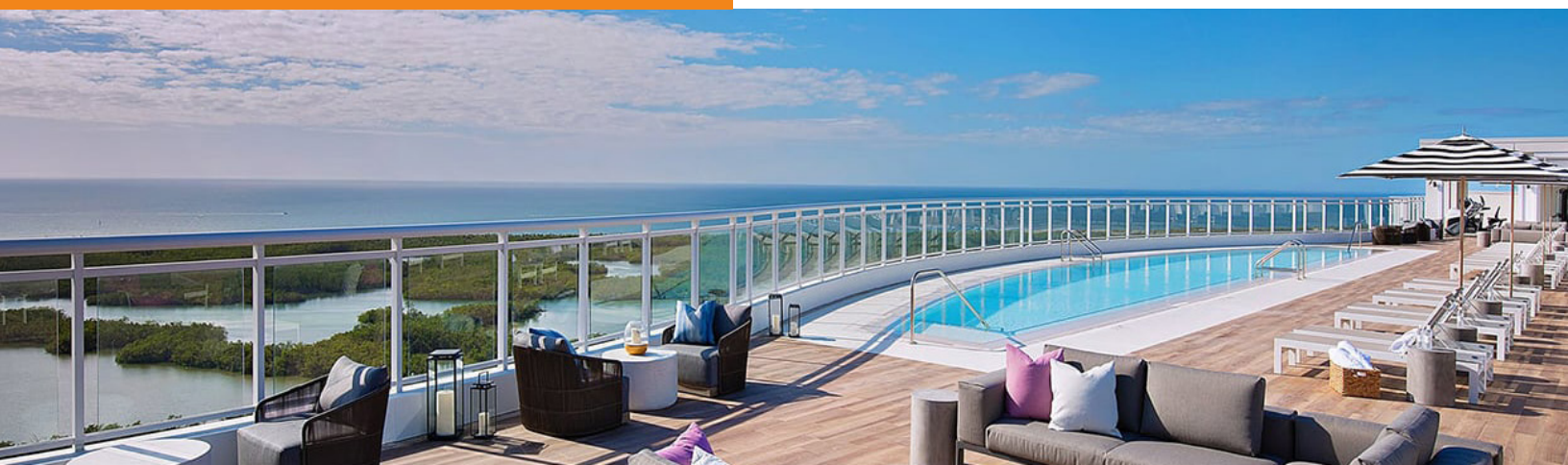
Implementing AP Automation at Soave

Once the list was narrowed down to just a few, making the final decision to choose IntelliChief really came down to Soave’s assessment that IntelliChief had the right people and approach to partnering with customers for the long term. Throughout the decision-making process IntelliChief stressed its experience and expertise in JD Edwards World and EnterpriseOne and its partnering approach to customer satisfaction.

After meeting several of the IntelliChief staff during the sales process Soave became convinced IntelliChief’s scalable solution was the right solution and company for them. They started with 10 concurrent licenses and expanded to 15 as they grew into IntelliChief – a pace that worked for Soave. With the successful implementation of the IntelliChief ECM solution in HR and AP, Soave hopes to continue its partnership with IntelliChief over the long term with plans to expand the solution across other business processes.

Soave in its own words:

“You may get one or two people that are of a higher level in expertise in JD Edwards, but they’re not going to be the ones actually helping you implement, whereas IntelliChief had two of the primary resources that were involved in the statement of work discussions. We were able to get familiar with them even before we signed,”
said Turnbull





Implementing HR Document Retention Management and Invoice Automation

IntelliChief's implementation at Soave was two projects in one:

- HR document capture of employee documents (i.e., status change forms and other documentation) and connection to employee records in JD Edwards
- AP Invoice Automation for the accounting team using IntelliChief Workflow

With IntelliChief's structured approach to implementation utilizing a hybrid agile implementation methodology focused on milestone integrity and project management throughout the process, Soave found the implementation experience to be positive. The phased approach for the HR and AP projects included:



Each milestone and step in the process was carefully managed by an IntelliChief project manager experienced in both JD Edwards World and IntelliChief's ECM solution who worked with Soave to set milestones and project timelines and identified roadblocks as the project progressed so that they could be identified and resolved in a timely manner. Weekly updates were provided to key project leaders and any changes were fully vetted and communicated to all stakeholders before being accepted.

Because each of the two independent projects were customized for Soave, it was important to Soave that IntelliChief create a workable plan based on Soave's available resources and the plan was well communicated with the entire Soave team. For an implementation project to be successful, particularly for a project that touches multiple departments within an organization like Soave's AP and HR initiatives, there is nothing more important than planning and communication. IntelliChief really understood this need and provided the experience and expertise in both areas during the implementation process to not only meet Soave's expectations, but to exceed them.

CONCLUSION

Choosing IntelliChief as its software solution to automate and streamline the paper-intensive processes in Human Resources and Accounts Payable after experiencing a flood that destroyed records and the aftereffects of working remotely due to COVID gave Soave the opportunity to consider an ECM solution. The goal: eliminate the paper and standardize on a single ECM platform that seamlessly integrates with JD Edwards World and EnterpriseOne.

By partnering with IntelliChief, a leader in ECM and business process automation for JD Edwards, Soave has eliminated its reliance on paper documents and seen significant efficiency improvements and cost savings. IntelliChief's expertise and long-term experience with JD Edwards not only addressed Soave's business challenges of today, but also has allowed the company to further leverage its ECM investment by automating other business processes in the future.

The right experience. The right expertise. The right partnership. IntelliChief was simply the intelligent choice for Soave.