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Customer proximity and making work considerably easier

Processing customer queries directly



“With ELO, long searches, the interruption of workflows and the overflowing paper archives are now a thing of the past.”

Dierk Cordes,
IT Project Manager at leasconcept

With ELO, leasconcept now processes customer queries directly on the telephone. Information is available to employees centrally and at the click of a mouse. E-mails and faxes are archived quickly via the link between ELO and Tobit. Field staff access the terminal server from their home office via a VPN connection. Costs have been reduced in the areas of the archive, paper, photocopiers and search times.

“Lease what you want”, this slogan is literally the order of the day at leasconcept GmbH & Co KG. The customer is spoiled for choice. Whether it be professional espresso machines, modern art, the classic case of company cars or perhaps yachts. leasconcept offers its customers a broad portfolio of assets and a simple option for financing these. leasconcept models itself on the criteria of a private bank and has been advising small and medium-sized businesses on the funding of a wide range of capital goods for well over 30 years. The company attaches great importance to customer proximity. This automatically includes fast decisions, permanent contact persons and adherence to all kinds of agreements.



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For future-proof growth

Overview

Country: Germany
Industry: Leasing

The company

leasconcept is an owner-managed leasing company. With a risk capital of EUR 2.95 million, leasconcept has a stock of over 3,000 active agreements with acquisition values of over EUR 80 million. There is longstanding cooperation with well over a dozen savings banks and various banks from the private and corporate sector.

Challenge

The decision in favour of digital archiving was made due to an acute lack of space in the paper archive. Documents must no longer be lost and it should be possible for them to be searched quickly in order to be able to answer customer queries directly on the telephone, for example.

Solution

Automatic archiving and keywording of documents. Documents that are created at leasconcept and sent to the customer for signing, for example, have been given a barcode. Finally, an interface to Tobit has been integrated in order to be able to archive e-mails and faxes quickly in **ELO**. Incoming mail is scanned centrally and made available in the **ELO** archive. Field staff access the terminal server from their home office via VPN.

Benefits

Work is made considerably easier with direct processing of customer queries on the telephone. Information is available at the click of a button.

Future-proof solution concept for successful growth

“Ideas require a good concept”, an important guiding principle for leasconcept. A stock of over 5,000 active leasing agreements – and rising – is evidence of the successful implementation of customers’ ideas. As a result, the paper archive with the company’s leasing agreements was starting to burst at the seams. The decision to archive digitally was obvious. However, straightforward archiving would not have been enough for leasconcept; the project managers were thinking one step further. Bearing in mind the guarantee of the best possible customer support, the documents also had to be quick to find and easy to manage. The company finally found the solution for its own ideas in the shape of the **ELOprofessional** document management system. The **ELO** business partner on site understood and implemented the wishes of leasconcept. “With **ELO**, long searches, the interruption of workflows and the overflowing paper archives are now a thing of the past”, says Project Manager Dierk Cordes.

Employee acceptance ensures a functioning solution

Proposal, contract and credit records are the daily business of the leasconcept employees. A technically well-functioning solution with ease of use with regard to the documents therefore also conforms to the employees’ wishes. The acceptance of the employees was a fundamental requirement for the **ELO** business partner in the implementation of **ELOprofessional**.



Dierk Cordes also stresses how important it is to involve the employees: “Thanks to the intuitive **ELO** user interface, the employee will quickly find his way in his accustomed structure. In the archiving and keywording of documents, care was taken to make these as simple as possible.” The employees are now actively working on the enhancement of the DMS and are regularly making suggestions with regard to the expansion and optimisation of the system.

The user can manually select e-mails and faxes via an interface to Tobit and can then archive them. The archiving of all Word and Excel template has now been automated with the help of macros. Documents that are sent to the customer for signing have been given a barcode – in this way automatic keywording is also guaranteed here during archiving.

Smooth business processes and shorter processing times

Where there was previously a mail distribution folder for incoming mail that was forwarded to all employees one after the other, now the employees have the option to access their mail directly and centrally in the **ELO** archive. As a result the mail can be processed by all employees in parallel and at the same time, and can thus be processed much more quickly.

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Dierk Cordes,
IT Project Manager at leasconcept



Reference

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Information at the click of a button

“By using workflows, we have been able to significantly reduce the time needed for work in some areas. The work processes are now also transparent and traceable.”

Dierk Cordes,
IT Project Manager at leasconcept

In the past, leasing requests were sent from the field staff's different locations to a manager for approval in paper form. This involved long periods of time spent in the post and laborious processing of the document. With the **ELO** workflow function a leasing request is now created electronically and sent to the responsible manager. Upon approval, the signature of the manager is inserted automatically and the document can be processed directly. The total processing time is thus reduced to only a few minutes. The field staff can also access the files directly in the **ELO** archive via VPN and the terminal server. The requesting of files and laborious processing by the in-house staff are thus completely eliminated.

There are plans to connect to financial accounting in the AS/400 environment in a further step and to map the whole core business process (HR, accounting and controlling) using a digital workflow.