

Collier Restaurant Group

Dynamic Restaurant Conglomerate Improves Workflow Processing with docSTAR



INTEGRATED

Industry: Restaurant Management

Business Solution: docSTAR Document Management Software integrated with Sage ERP

Business Challenge: Save time, reduce costs, manage compliance and streamline Accounts Payable

Collier Restaurant Group has offered the tourists and residents of Sevier County, Tennessee dining options for more than 40 years. With nearly 600 employees, the firm owns and operates 14 establishments under six different brands, including nationally recognized names such as TGI Fridays, Golden Corral and The Melting Pot. Collier Restaurant Group's CFO, Royce Pruitt, offers insight into the firm's experience implementing docSTAR solutions.

Responsible for all finance and IT functions, Pruitt has both a high-level understanding of the necessity of efficient processing and also a tactical understanding regarding functionality and flexibility. His familiarity with the firm's numerous workflows and processes made him the ideal lead for Collier Restaurant Group's quest for the right document management system.

Existing Challenges

When Collier Restaurant Group (referred to as "Collier" here forward) initially approached docSTAR in 2011, their existing platform was creating more trouble than it was worth. "The initial platform was falling down, crashing all the time," described Pruitt. "It was given to us by a reseller. He'd taken a CPA software package and made some modifications to make it work for us. But it wasn't designed for the volume of scanning we were doing."

Because of both the high volume of scanning and poor search design, the system routinely crashed. When crashes occurred, someone from Collier's internal IT team would have to be pulled to restart the services related to it. "This process took 15-30 minutes each time and it often required server reboots," Pruitt stated

But it wasn't just the increased downtime that led Pruitt on a search for a new system. It was also the lack of flexibility. Collier needed a system that could grow and develop toward their goal for each individual restaurant to supply invoice, payroll and revenue data automatically into their accounting software without having to rekey information. This desire for a more streamlined and integrated system that omitted duplicate processes was the impetus for Pruitt's quest.

After investigating numerous alternatives, Collier selected docSTAR's document management solution. "docSTAR's design allowed us to keep our existing internal processes without having to adapt to a document management software system," Pruitt continued, "docSTAR was clearly a superior product [to our existing solution] and no one else had the integration that worked with our databases, meaning everything would have to be manually done."

Implementation & Expansion

It wasn't long before the docSTAR team was given their first real opportunity to shine. "I was extremely fearful that they would not be able to convert our legacy data," Pruitt noted, "In fact, I was kind of counting on that not happening. Technical issues kept preventing the conversion and I figured that they would throw their hands up and give up on us."

However, Collier was given immediate support, as multiple program engineers dedicated their time to analyzing and addressing the challenge. "They didn't give up. They kept working at it, kept fixing it, and they got it. I was incredibly impressed," Pruitt said.

Once the two systems were aligned and all of Collier's data was converted, process implementation began right away.

Human Resources Workflows

Employee Files: docSTAR was implemented with employee files first. Everything from W-4 documents to disciplinary records are now maintained in one central, secure platform. This allowed for a more streamlined workflow to be initiated for new hires.

Health Insurance: With the upcoming changes to health insurance as a result of Obama initiatives, there will be a significant increase in the level of documentation required for processing health insurance. “[The changes] are huge,” states Pruitt, “We don’t think there is going to be a lot of participation in the new health insurance we’re going to offer, but we think the cost of administrating it is going to be as great as the cost of the insurance we provide.” If Collier were to manage the process manually through traditional paper documents, “it would be impossible” due to the volume and flow. “The docSTAR solution is going to save the day as far as administrating the healthcare law,” he adds, hailing its ability to streamline the capture and processing of required documents.

Processing 20,000 Invoices Per Year

Industry Avg: \$15.61 per invoice* = \$312,200

Best-in-Class: \$3.09 per invoice* = \$61,800

Estimated Yearly Savings = \$250,400

*Source: Aberdeen Research

Accounts Payable Processing

Collier has more than 100,000 documents in their existing AP database and continues to process approximately 20,000 invoices annually. So, naturally, they are focused on AP document processing efficiency.

docSTAR's **Intelligent Data Capture** feature captures the invoice image, extracts key metadata, and subsequently pushes that information to a Microsoft Access Database driven Inventory Module and simultaneously routes the invoice to the secure docSTAR secure repository for archival.

The Collier main office is able to capture the invoice data from its various restaurants through the Microsoft Access Database driven inventory module. The line item details are then reviewed and coded before sending it on to their **Sage 100 ERP** accounting system. Pruitt envisions expanding Intelligent Data Capture to all company operations, including daily transactions, in coming years.

Given the volume of existing and incoming data through the AP department, the search abilities of the system are critical. The docSTAR system facilitates comprehensive searching based on flexible queries. "Our previous system had awkward search functions. It didn't have anything like docSTAR's 'contains' logic," Pruitt described. "So if you didn't design your search just right, it didn't find the documents and would sometimes crash the system."

Together, the image capture and search functions allow Collier's AP department to operate smoothly in all tasks relating to archived and incoming invoices.

Purchasing/Invoice Processing

As was the case with their AP processing, Collier is now able to leverage image and data capture for their purchasing/invoice processing system. This internally written software retrieves data directly from the POS systems in the restaurants and subsequently pushes that data into the firms' accounting software. docSTAR is able to automate components of this workflow and again allow for improved archival.

Return on Investment (ROI)

Collier experienced a variety of benefits from implementing the docSTAR solution. Among them were time savings, improved security and increased compliance, all of which have an impact on Collier's bottom line.

50+ Hours Saved Per Week

By eliminating the excessive and growing downtime that Collier was experiencing with their previous system, Pruitt estimates that they are saving roughly 5 man-hours every

week. From the image capture function he estimates an additional 5 hours a week of time savings, and expects that number to double in the next two years. With the reduction in duplicate processing and improved workflow for their upcoming expansion in purchase/invoice processing, Pruitt sees the potential for a further 10-15 hours of time savings by next year.

Comparing docSTAR to a paper-based process, Pruitt estimates a minimum time savings of 30-40 hours per week. “We are not a big company but we do push technology,” Pruitt stated. “Going to a paperless environment saves you a lot of man-hours. With a paper environment, someone pulls a file and it’s gone and each person spends thirty minutes trying to chase it down. That’s an incredible waste of time and productivity.”

Increased Security

“If we’d ever had a catastrophic crash with our old product, we’d be dead – gone,” admitted Pruitt. Forced to support their initial system themselves, Collier was exposed to significant risk as they were open to the consequences of a major technical malfunction. With docSTAR and ITC, however, they’re provided comprehensive support that not only mitigates the potential for downtime, but also allows them to further adapt the product to additional workflows.

Pruitt also pointed out that with an electronic document management system, “you don’t have lost documents” as is frequently the case with paper-based processes. With docSTAR’s tracking and data accessibility features, Collier knows where all documents are at all times *and* who has access to them.

Improved Reporting Compliance & Liability

With the flexibility and tracking afforded by the docSTAR system, Collier has streamlined their auditing and reporting process. “If auditors come in, we just set them up with a laptop and say ‘here you go, search away.’” Pruitt commented, “Before, we’d have to pull all those documents.”

What’s more, with docSTAR, Pruitt has considerably less anxiety over the oncoming compliance issues arising from the new health insurance mandates. “There’s *a lot* of

potential liability if we don't get all our documentation ducks in a row, and that's why the docSTAR solution is vital. When you offered the insurance to the people, when they declined it, when it terminates – all of these things you have to track and do right – and if we don't do something right and communicate properly with the employee, we could be held liable.”

Pruitt offered an example, citing that if an employee is not correctly notified of an insurance termination and that employee subsequently gets into a serious accident, Collier would not only be exposed to fines, but could also be found responsible for any medical expenses incurred by the employee. However, with the docSTAR system, tracking and archiving of such documentation is automated.

Focus on the Future

In looking ahead, Collier is excited to expand docSTAR technology to other departments and activities, streamlining additional workflows and further diminishing duplicate processes that occur between the individual restaurants and Collier's headquarters. They look forward to additional time savings, and broader gains in security and compliance as the system is leveraged in other processes.

“A lot of our employees were skeptical at first, but the more they're using docSTAR, the more they're impressed. Where *I'm* really impressed is the simplicity of it, because the simplicity makes it flexible,” Pruitt noted, emphasizing the system's ability to integrate with unique internal systems and its adaptability for new documents. It's clear that Pruitt sees docSTAR's technology as the leading document management system.

However, before completing the interview for this study, Pruitt relates the entire positive experience to docSTAR's human side: “It's the docSTAR people that have made this product so strong.”