

FJ CHALKE CASE STUDY

Established in 1929, FJ Chalke is a family owned multi-franchise car dealership representing Abarth, Fiat, Isuzu, Jeep, Kia, Nissan and Suzuki.



ANALYSIS

With showrooms throughout Somerset, FJ Chalke continues to grow, which has allowed their most recent Kia & Nissan flagship showroom to open in Yeovil in December 2019.

As with most businesses that experience rapid growth, the challenges of managing increased amounts of paperwork become a much larger task. The Sales Department were storing deal files in costly off-site storage and the team were spending a lot of time searching for the files they needed.

The challenges didn't stop there. The accounts department were now managing more invoices, dealing with more queries, paying more suppliers, and struggling to ensure documents didn't get misfiled to comply with audits. Staff were constantly having to travel between all of the branches, compiling paperwork, sending it back for approval and signing, then collecting it again, with each 50 mile round trip taking over 1.5 hours. Whilst this was a critical process for the department, it was time consuming, put a strain on resources and meant keeping track of specific documents was difficult.

YourDMS SOLUTION

FJ Chalke wanted to store their files securely, in one place, so that all departments could easily access the information they needed.

Initially, YourDMS helped implement an Invu Document Management system in the Sales department. This allowed staff, in a matter of weeks, to scan old and current deal files in a structured manner, giving them visibility and the ability to locate any document within seconds.

With the success within the Sales department, YourDMS's mission didn't stop there. As part of the service, conversations moved swiftly on to how they could help save time and money within other areas of the business, starting with the accounts department.

Invu was rolled out with integrated digital workflow functionality. A document would start its digital journey as soon as it enters the business (via post or email). Invoices are filed in Invu and users add relevant pieces of information in order for the document to be stored and distributed to the correct department manager for approval.



Security presets are configured when the system is setup to ensure that an invoice can only be accessed by the team member who needs to process it.

Managers could clearly see the invoice, add notes and see what is required from them with Invu's fully customisable workflow all within a click of a button.

Other features include duplicate checking, document audit trails, fixed lists, ability to action multiple work tasks at once.

RESULT

The Invu Document Management system has transformed the way the FJ Chalke Group work.

The Sales department now have their files stored in Invu, which allows them to find deal files in minutes, respond to queries quickly and deliver fantastic customer service. It also removes the risk of files being damaged and the need for off-site storage.

The Accounts team no longer have to travel between branches to collect paperwork, or to send paperwork off to be signed - it is all done through Invu. Not only does this save them a huge amount of time, it completely eliminates the issue of paperwork going missing as invoices can now be tracked through the whole process. Managers can easily query an invoice and reject it with comments.

Invu features multiple search options including by date range, invoice status, invoice number, and supplier, so the Accounts team can always find the files they need in seconds. This is especially helpful during an audit.

ON THE YourDMS SUPPORT TEAM...

YourDMS are genuinely the most helpful support team I have ever come across in over 17 years working in finance! They are always cheerful and no issue is ever a problem for them to try and help you with. They are also very understanding when it comes to implementing change at a slower pace than maybe some other businesses would.

Nicola Green
DEALERSHIP ACCOUNTANT AT FJ CHALKE

As Nicola Green, Dealership Accountant at FJ Chalke explains, "It has also helped them massively when it comes to our yearly audit, because everything can be found so quickly searching through Invu, rather than having to sort through masses of paperwork in boxes in a cupboard."

Nicola is also pleased that YourDMS have helped to identify where Invu can help in other areas of the business, with other departments such as HR using Invu to manage their paperwork.

Future steps

FJ Chalke are keen to explore how automating their Invoice Processes, to include 3 way matching, can benefit the business.

What is FJ Chalke's advice for other companies tackling similar problems?

Nicola comments, "My advice would be to just go for it. We faced quite a bit of resistance when implementing the new system, as most organisations do, but as soon as staff started using Invu, they could see how much better it was for everyone. Any initial difficulties are well worth the effort, when it makes everything so much easier in the long-run."