



Kofax Case Study Shared Services

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– Lynn Miland,
Senior Director PTP, Central Finance



Even if you don’t know it, you are most likely familiar with more than one of Carlson’s many brands. In the travel and hospitality industries, Carlson is a giant. One of the largest privately held corporations in the United States, the Minneapolis-based company’s businesses and franchises—including Carlson Wagonlit Travel, T.G.I. Friday’s, Carlson Marketing, and Radisson Hotels and Resorts—operate in more than 150 countries and employ more than 160,000 people.

Carlson Achieves World Class Accounts Payable with MarkView

Carlson has established a shared services organization for accounts payable (AP) to serve its operating units in the United States and leverage economies of scale. To efficiently process 3.3 million invoices each year, the company has streamlined its AP operations using MarkView for Accounts Payable from Kofax.

Choosing the Right Workflow Tool

Previously, Carlson had used an imaging and indexing tool with limited functionality to gather approvals for invoices. “That experience taught us that it’s very important to select the right workflow tool, as opposed to just a workflow tool,” says Lynn Miland, Senior Director PTP, Central Finance. “What we had in place before really didn’t take any of the work out of AP. It just changed the character of it.”

The tool lacked sufficient integration with Carlson’s Oracle enterprise resource planning (ERP) system. “We needed a system that was much more closely integrated with Oracle, and that’s where we started looking at different options,” says Miland. “MarkView rose to the top because it is so tightly integrated with Oracle. It really lets you improve your accuracy and controls, and with a lot less effort on the part of the users in the AP team.”

Tripling AP Productivity

Using MarkView to automate the entire AP process—from invoice capture and workflow to a reliable audit trail—Carlson has increased the efficiency of its AP department by more than threefold. “Right now, we have five people doing what 17 people did a year ago, and we’ve been able to reassign those FTEs to more strategic tasks,” says Miland. “We’ve also avoided the need for incremental hiring—we’ve been able to integrate recent acquisitions without hiring more AP staff.”

Because of the system’s integration with Oracle, employees can resolve issues with invoices much faster. “Using our previous tool, we had to go into Oracle directly, look up who the buyer was, route the invoice to them, and include instructions about what we needed them to do,” says Miland. “When they were finished, they would return it via a generic error-management queue which another team of people

had to work through. What's nice about MarkView is that it only includes the people who have been involved with the transaction. And when they're done, they just click 'return to AP' and it comes right back to the person who sent it to them."

Increased Accuracy, Lower Audit Costs

Carlson has also improved accuracy by minimizing the potential for human error in data entry. "Our accuracy rate in September was 99.9 percent," Miland reports. "Before MarkView, it was in the low nineties at best."

The level of accuracy and visibility that Carlson has achieved with MarkView is making its auditors happy. "We're going to have a great audit this year," says Miland. "After showing our auditors how MarkView enforces coding and approval-level compliance, they decided to limit the scope of their A/P audit. They're not going to be doing individual transaction testing for compliance this year, which will lower our audit costs."

Complete Payback in Less than One Year

By replacing its previous workflow tool, requiring fewer FTEs and eliminating the need to outsource any part of its AP function, Carlson will recoup its investment in MarkView in less than one year, according to Miland. "What's great about Kofax is that they've really had to think about all of the different problems that could arise in an AP workflow, and a lot of them come pre-resolved, so we don't have to learn those hard lessons," he says. "Kofax is a tremendous lever for us."

About Kofax

Kofax plc (LSE: KFX) is the leading provider of document driven business process automation solutions. For more than 20 years, Kofax has provided award winning solutions that streamline the flow of information throughout an organization by managing the capture, transformation and exchange of business critical information arising in paper, fax and electronic formats in a more accurate, timely and cost effective manner. These solutions provide a rapid return on investment to thousands of customers in financial services, government, business process outsourcing, healthcare, supply chain and other markets.

Kofax delivers these solutions through its own sales and service organizations, and a global network of more than 700 authorized partners in more than 60 countries throughout the Americas, EMEA and Asia Pacific.

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