

CASE STUDY



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The shared services organization Carlson uses for its accounts payable (AP) operations serves the company's operating units in the U.S. To more efficiently process 3.3 million invoices each year, Carlson streamlined its AP operations using Kofax MarkView®—and recouped its cost in just one year.

INVOICE VOLUME

GROWN TO MORE THAN
3.3 MILLION PER YEAR

99.9%

ACCURACY

ELIMINATING

THE NEED TO OUTSOURCE
ANY PART OF AP

Work Like Tomorrow.™

KOFAX

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ABOUT CARLSON

Carlson is a company representing many brands within the travel and hospitality industries. It is one of the largest privately held corporations in the U.S. 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.

PRODUCTS IN USE

Kofax MarkView®

FOCUS

Business process management

CHALLENGE

Carlson's previous workflow system used an imaging and indexing tool with limited functionality to gather approvals for invoices. Invoice volume had grown to more than 3.3 million per year.

"That experience taught us that it's very important to select the right workflow tool, as opposed to just a workflow tool," said 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 previous tool also lacked sufficient integration capability 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," Miland said.

SOLUTION

MarkView soon became the top choice for an automation solution because it tightly integrates with Oracle.

"It really lets you improve your accuracy and controls," Miland said, "and with a lot less effort on the part of the users in the AP team."

MarkView enabled the automation of the entire AP process—from invoice capture to a workflow that has a reliable audit trail. Overall, Carlson increased the efficiency of its AP department by more than threefold.

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.

Because of the system's strong 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," Miland said. When that was finished, it was returned via a generic error-management queue involving another team of people.

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

"MarkView rose to the top because it is so tightly integrated with Oracle."

RESULTS

Carlson has improved accuracy using Markview because automation minimizes the potential for human error in data entry.

"Our accuracy rate in September was 99.9%," Miland said. "Before MarkView, it was in the low 90s at best."

He also said Carlson has been able to manage its existing staff more effectively.

"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," said Miland. "We've also avoided the need for incremental hiring—we've been able to integrate recent acquisitions without hiring more AP staff." The level of accuracy and visibility that Carlson achieved with the MarkView solution is making its auditors happy.

"We're going to have a great audit this year," Miland said. "After showing our auditors how MarkView enforces coding and approval-level compliance, they decided to limit the scope of their A/P audit."

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For example, Miland said the auditors are not doing individual transaction testing for compliance this year. This will help lower the overall cost of the audit.

By replacing its previous workflow tool, requiring fewer FTEs and eliminating the need to outsource any part of its AP function, Miland says Carlson will recoup its investment in MarkView in less than one year.

“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,” he said, “so we don’t have to learn those hard lessons. Kofax is a tremendous lever for us.”

After showing our auditors how MarkView enforces coding and approval-level compliance, they decided to limit the scope of their A/P audit.”

Lynn Miland, Senior Director PTP, Central Finance

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