

INVU:

# Exclusive Hotels and Venues

*Pure efficiency throughout*

Exclusive Hotels and Venues required a solution which would speed up invoice processing and allow staff to spend time helping the business grow.



*The Manor House, an Exclusive Hotel & Golf Club*

## Exclusive Hotels and Venues

Document Management | Capture | Coding | Search 200 | Web Approval



*Pennyhill Park, an Exclusive Hotel & Spa*

*Founded in 1981, Exclusive Hotels and Venues is a family owned, independent group of beautifully situated country house properties perfectly adapted for the modern traveller.*

### Introduction

With six sites located across the south of England from Wiltshire to Winchester, Surrey to Sussex the group employs over 750 permanent staff to help maintain the group's exceptional quality.

With a manual, time consuming and paper intensive process previously adopted at the group, there was a strong desire to automate the current process and bring efficiency to the 70,000 invoices the group receive per year. The importance of reducing the reliance on paper based systems and allow the Finance team to focus more time on managing key areas/challenges for the business was essential when deciding on implementing an Invoice Processing and Document Management solution.

*"Pure efficiency... from the invoice arriving to it being stored away ready for an audit."*

Christine Davies,  
Finance Director

### Solution Summary

- ▶ Seamless integration with Sage 200
- ▶ Automatic capture and routing of documents for approval
- ▶ Improved accuracy and speed of invoice processing
- ▶ Full visibility of documents throughout the process



**EXCLUSIVE**  
HOTELS and VENUES

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## Finding the right technology

Having looked at data scanning technologies in the past, the solutions on offer didn't have the capability to intelligently scan invoices and automate the current manual process. The group therefore did not see the benefits required and the search was halted with the group continuing to work in the same way.

In early 2015, with an ever increasing desire to automate and improve the current processes the group Finance Director, Christine Davies, restarted the search and began setting out a criteria for what was required.

*"There was a lot of manual processing and lots of paper being passed from the kitchens to the accounts departments."*

### Key criteria included:

- ▶ Ability to scale the operation and re-deploy experienced Finance members into a more productive role for the company
- ▶ Seamless integration with Sage 200 to reduce duplication of effort and provide easy access to documents
- ▶ Automatic routing of documents for approval
- ▶ Full visibility of documents throughout the process
- ▶ Improved accuracy and speed of processing
- ▶ Remove document/paper storage issues

The chosen solution would need to reduce the amount of paper being used and the time it took to be authorised; a single document could be handled six times during the manual process. With 40% of invoices arriving as a hard copy a lot of paper made its way around the six locations. Once approved, data would be manually typed into Sage 200. *"There was a lot of manual processing and lots of paper being passed from the kitchens to the accounts departments."*



## Working with the right people

When selecting Invu as the preferred supplier Christine explained, *"The people and support, plus a great product, sold it to us above the other vendors."* Christine goes on to explain that when working in an industry which is based around people and their expectations, it is important to have a good understanding and relationship with the chosen supplier, *"There was good support and a good understanding. You work with the people as well as the company."*

*"I don't employ processers, I employ people who look at the business and want to get involved in the growth."*

## Teamwork

With Christine leading the implementation alongside key Finance Controllers and Purchase Ledger Clerks from across the group, the project began in October 2015. *"We worked as one big team even though it was across six sites."* It was important that all users were on board with the solution Christine explains, *"You have to involve the users, they are the people who have the questions as they will be using the system."* Christine and the team required the system to be up and running by the new financial year, April 2016, *"I didn't want to start a new financial year and have part of a system. I wanted to start the financial year with the new system so all invoices from April 2016 onwards would be scanned and automatically processed,"*

## A system that flows

With the solution going live in 2016, all invoices are now automatically routed for authorisation to the relevant manager for verification and processing, a process which eradicates the previous manual sign off. The organisation no longer handles paper meaning they don't lose any documents, the system just flows. *"It's great when the invoices are sent through now, managers don't have to move around the place to authorise an invoice."*

*"You have to involve the users, they are the people who have the questions as they will be using the system."*

As well as a seamless integration with Sage 200 any invoices which arrive via email are automatically captured, processed and stored electronically. All other invoices are scanned in and data automatically extracted from the invoice using the Invu Capture module. A workflow will then route the invoice to the relevant authoriser for approval. Once approved, the invoice will be saved and securely stored in Invu with the invoice data sent and applied to the Sage 200 system.

Invoices, of which 45% are from food and beverage suppliers, are automatically coded which has removed the need for manual coding resulting in staff being utilised in other areas of the business. Christine continues, *"I don't employ processers, I employ people who look at the business and want to get involved in the growth."*

Exclusive Hotels and Venues also recognised that there would be value in using the Invu Document Management system in other departments. All invoices are automatically stored in the Invu system and managers are now able to search and retrieve invoices rather than going to Accounts for any queries. Authorised personnel are also able to look up documents from other hotels which saves them time.

*“They see you investing and being aware of what takes up their time, and in turn this creates a better working environment for them as well as for the company.”*

## Flexibility, efficiency, visibility

Since implementing the Invoice Processing solution across the group the benefits have been endless. The flexibility that Invu has provided has meant that people no longer rely on the Accounts department to find invoices, *“It’s the availability of being able to look at an invoice and seeing what the costs were six months ago straight away.”* From a payment point of view the number of queries received has reduced because paper is no longer used, *“Someone can make an instant decision for authorisation when they open their emails.”*

As well as the improved supplier relationships and cost savings in terms of filing and storage, morale and staff engagement has also risen. Staff are no longer sat at their desks manually processing and filing invoices, or chasing people for approval, *“Staff now have time to get involved in other aspects of the business and further their knowledge.”*

The Accounts department are also able to use the bespoke reporting tool to see how many invoices are in the system, who they are sat with and for how long.

For Christine implementing Invu was a huge positive for the staff, *“They see you investing and being aware of what takes up their time, and in turn this creates a better working environment for them as well as for the company.”*

## Conclusion

With improved access and efficiency Christine and her team continue to see the benefits of Invu across the Exclusive Hotels and Venues group. Feedback from the other members of the organisation has been very positive and managers are now enjoying the ability to view and query invoices without the need to hassle the accounts team. Staff who previously spent their time manually processing invoices and entering data continue to spend the time saved getting involved in other aspects of the group’s growth.

Christine sums up the Invu Invoice Processing solution as *“Pure efficiency. . . from the invoice arriving to it being stored away ready for an audit.”*

## About Invu:

Invu develops Electronic Document Management (eDM), Accounts Payable (AP) and Purchasing solutions for a range of sectors, particularly those which are highly document dependent or where compliance is important. Invu’s comprehensive product suite encompasses document and content management, purchasing, workflow, document automation and collaboration solutions.

