



Major Regional Lexus Dealerships

Case Study

Dealership Discovers the Key to Luxurious Customer Service

Higher State Technology, a managed IT service provider, helped two major regional Lexus dealerships implement DocuWare. The dealerships gained total control of their data and reconfigured their filing rooms into luxurious spaces that improved the waiting experience for their customers. They digitized documents including vehicle sales documents, repair orders and more to allow staff from both locations to have quick immediate access to customer information. As a result, they were able to improve records management, efficiency and customer service.

Higher State Technology is an IT service provider that bridges the gap between business needs and IT resources for small and medium sized businesses. The company worked with their client, a major regional Lexus car dealership, to provide technology resources and expertise as well as leverage the design, installation and management of their IT systems. The dealership takes as much pride in their customer service as in their vehicles. They have a large selection of cars, SUVs and crossovers, and pioneered the move toward elite service and world-class amenities in the waiting area, including a complimentary coffee bar complete with a barista and a high-end shopping boutique.

Two Major Regional Lexus Dealerships

Industry: Retail / Wholesale

Location: Texas, USA

Application: Accounts Payable / Accounts Receivable, Company-wide, Customer Service, Electronic Workflow, Records Management

Document Types: Deal Jackets, Repair Orders, Repair Invoices, Driver License Scans, Parts and Boutique Invoices

Requirements

When the dealership decided to expand and build another Lexus dealership in a nearby community, they did not want to dedicate any of the physical space for record storage. They needed to find an on-premises electronic document management solution that would be compatible with their dealer management software, Reynolds & Reynolds, and allow them to transition to a paperless process. The dealership wanted to maintain total ownership of their data and digitize car sales documentation known as a deal jacket, parts and boutique invoices, repair orders and loaner car records.

The Tasks

- Eliminate physical file room
- Implement a digital document storage compatible with dealer software
- Digitize repair orders, mechanic notes and diagnostic reports in one system
- Utilize searchable records to improve customer service

Solution

The dealership worked with their Managed IT Service Provider, Higher State Technology, to find the right software and the right vendor. They chose to partner with an Authorized DocuWare Partner because of their in-depth knowledge about car dealership documentation requirements and dealer software, Reynolds & Reynolds. After evaluating several options, they selected DocuWare because it simply provides all the flexibility, security and transparency they needed.

For each vehicle sold, a deal jacket of 40-100 documents such as a driver's license scan, insurance information, and credit application is created. According to state law, most of these documents must contain "wet" signatures. To meet this requirement, the dealership prints documents so the customer can physically sign them. Once all the paperwork is complete, the documents are scanned and automatically indexed using data that DocuWare collected from the dealer software.

In the service department, the entire process can be done digitally, but the dealerships' mechanics preferred working with paper over using a tablet or computer. DocuWare is very flexible so a hybrid solution that pleased the mechanics and the dealership owners was implemented. Today, when a customer arrives to have their car repaired, a Repair Order is created in the dealer software, then physically printed and simultaneously electronically stored in DocuWare. The printed document stays with the vehicle and additional repair documents and any mechanic notes are physically added to the paper RO and put in a plastic jacket.

When the repair is complete, a Service Advisor will enter any new hand-written information on the RO in the dealer software, create the Repair Invoice and store it in DocuWare, automatically changing the RO status to "Closed." At the end of the day, the "marked-up" Repair Order and other supporting documents, will be scanned and replace the original Repair Order. When the customer arrives, the cashier will open the Repair Invoice and have the customer sign for the repair and pay for it, using ReyPay, a dealership payment processing system. Repairs that need to be submitted for warranty or extended warranty payments are then routed to the Warranty Manager, where they are reviewed and submitted.

With great results in other departments, their DocuWare system continues to expand to include the storage of driver license scans, auto parts invoices, boutique invoices, as well as loaner car agreements.

Applied Modules

- [Autoindex](#)
- [Barcode & Forms](#)
- [Connect to Outlook](#)
- [Import](#)
- [Mobile](#)
- [Smart Connect](#)
- [Task Manager](#)

Benefits

With DocuWare, the regional Lexus dealers met their primary goal of achieving complete control of their data and not being so tightly bound to one proprietary system. They gained the ability to store documents, both from within the dealer software and external documents, together in one searchable database.

By implementing electronic document storage, the dealership had space to house a boutique filled with high-end merchandise, including home décor, gifts, apparel, and accessories. This unique concierge-like shopping experience paired with a complimentary gourmet coffee bar and bakery improved the waiting experience for the dealership's customers and raised the bar regarding customer service.

"Customer service is the number one focus at both Lexus locations and is a high value target for the dealership. We've reduced human error through digitization and electronic workflow and have found that any improvement in efficiency and accuracy ripples out and positively impacts customer service," said Doug Miller, CEO of Higher State Technologies the IT provider for the Lexus dealerships.

Today, dealership employees can access a customer's records from either dealership, regardless of where their vehicle was last serviced. Having immediate access to a vehicle's service records allows them to provide flawless customer service.

Digital document management also allowed the dealerships to effectively share one accounting and HR department. Scanning and indexing is so much more efficient that the dealerships were able to redeploy employees to other tasks.

"With DocuWare, retrieving digital information is exponentially faster than finding something in the file room," said Miller.

The Benefits

- Dealership has control of their data in a non-proprietary system
- Raised the level of customer service with immediate access to vehicle history regardless of location
- Gained floor space to improve waiting room facilities
- Searchable digital database improves record management



Conclusion

In summary, both Lexus dealerships are pleased to have total control of their data. With the help of their vendors, they successfully customized their IT infrastructure with a hybrid system that utilized the best features of their dealer software and DocuWare.

The dealerships go above and beyond for their customers and are happy to find a document management solution with the same commitment to quality.



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Doug Miller, CEO of Higher State Technologies, Managed IT provider for two major regional Lexus dealerships



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