

Electronic Customer Records Increase Auto Dealer Efficiency

Pearl Motor Company has improved customer service and increased efficiency and security by managing customer records using FileBound.

Business Needs

Paper-based records made it more challenging for Pearl Motor Company to provide the high levels of customer service it strives for and protect sensitive customer data. When Pearl Motor Company moved to a new location after almost 100 years in business, owner George Huffman decided to eliminate the inefficiency of and space devoted to paper files by implementing Upland's FileBound to manage documents.

The Solution



Instead of maintaining paper-based files, Pearl Motor Company worked with Missouri-based FileBound solution partner IMS to begin converting active records to electronic documents stored in Upland's FileBound secure cloud software.

Benefits

- Immediate access to customer records empowers staff to deliver a higher level of customer service
- Security capabilities ensure that personal information, such as credit data, is protected
- Eliminating paper-based records allows Pearl Motor Company to make better use of space
- Cloud software provides disaster recovery of important customer records at an affordable price

Pearl Motor Company

Pearl Motor Company (Mexico, MO) is a Buick, Chevrolet, Cadillac and GMC auto dealer serving mid-west Missouri since 1916. A fourth-generation family business, Pearl Motor offers new and used auto sales, service, parts and financing.

INDUSTRY:	Auto Dealership
HEADQUARTERS:	Mexico, MO
EMPLOYEES:	28
WEBSITE:	pearlmotor.com

"The efficiency and ease are the biggest benefits of FileBound. I can't put a dollar amount on it, but it frees space, frees time and improves customer service."

— George Huffman, dealer,
Pearl Automotive Company

Securing customer records in the cloud

Almost 100 years ago, George Huffman's great-grandfather saw the opportunity in the latest advancements in automobile technology. Around 1916 when Pearl Motor Company was founded, manufacturers began to use machine-tooled parts, which made cars more affordable, and eliminated dangerous crank starters and kerosene lights. Three generations later, Pearl Motor still offers residents of mid-west Missouri the latest new and used cars and service with an emphasis on customer service by leveraging the latest technology.

While the commitment to customer service hasn't changed, operating a car dealership has become much more complex, from navigating manufacturer programs to mastering new marketing technologies. Huffman recognized that maintaining paper-based records for all transactions for every new or used car sold at his dealership was one more complication he didn't need, especially when faced with the prospect of moving decades of outdated records to a new location in 2014.

Huffman had been researching potential electronic solutions for some time when IMS presented FileBound's cloud-based document management capabilities. "From my research I knew about the emerging benefits of cloud – cost, no hardware investment, no hard drive to steal, no appliance to break. It just makes sense," states Huffman. "But I was sold on FileBound Cloud because it's secure and easy to access."

Pearl Motor staff now scan all of the documents associated with the purchase of a new or used car, from the credit application to the dealer jacket that has detailed information about the sale. Using a scanner from Fujitsu Computer Products of America, a part-time staff member is also working on scanning existing records dating back about five years.

About FileBound

Upland's FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

Improving customer service with electronic records

Electronic records make the sales process easier for staff and customers. "If someone just bought a car a year or two ago, we can just pull up the credit application and have them review it for changes instead of having to start the process from scratch every time," says Huffman. "Or if someone wants to trade in a car they purchased here, we have an immediate record of what they paid and how much the payments were so we can make that process more efficient."

"I was sold on FileBound Cloud because it's secure and easy to access."

— **George Huffman, dealer, Pearl Automotive Company**

FileBound software provides security for personal financial information that is protected by law. FileBound also protects these documents from natural disasters such as fire or floods to help Pearl Motor maintain business continuity.

"My dealer management software, which is backed up to a secondary site, maintains the customer database, so we could stay in business after a disaster," says Huffman, "But we would lose a lot of information about deals if we didn't have these records and that would make us much less efficient."

Huffman recalls coming home from college to work at Pearl Motor and dealing with an entire upper floor filled with files, many dating back before he was born. When he moved to a new location in 2014, he wanted to use the space more efficiently. "FileBound has been an easy decision and a win-win; it will be nice once all of the paper is eliminated," comments Huffman, who already has his eye on getting rid of the filing cabinets in other areas of his new location, which house parts documents, service repair orders and technician notes. "The car business has become complicated enough, at least this is one thing that makes it easier."

The Upland Product Family



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