

**Itergy**

# Insights



Simplifying IT So You Can Focus On Your Business



# WILLSON INTERNATIONAL

## CASE STUDY

### Fast Facts

- Canadian/U.S. customs brokerage & logistics services company
- +100 year old organization
- Fourth-gen family owned business

### Product used



### Challenges

- Labor-intensive paper-based business processes archived emails and limited storage
- Heavy reliance on costly archiving Limited mobility access
- Lost sales due to superior data services offered by competition
- Lost profits due to inefficient internal processes.

### Solutions

- SharePoint Integration

### Client

Willson International is a 100+ year old Canadian and U.S. customs brokerage and logistics services company, and therefore deals with a huge quantity of documents. They need to be able to receive and process them quickly, retain them for 7 years, and be able to search/retrieve them easily at any point during this lifecycle.

### Objective

Saying Goodbye to Paper - Building a Multi Million Document Repository to Save Time and Money

### Challenges

Willson had been running its business entirely via labor-intensive paper-based business processes, from receipt of documents sent by client/customers/shippers, to processing and invoicing shipments, to heavy reliance on costly archiving, and to outsourced hardcopy retention and storage solutions. As a result of these paper based processes, Willson was challenged with high storage/handling/retrieval costs, lost sales due to superior data services offered by competition, and lost profits due to inefficient internal processes.

### Solution

We worked with Willson to build a robust Enterprise Content Management system on SharePoint that streamlines and transforms Willson's core business activities into paperless based processes. It incorporates various document formats and sources (i.e., faxes, emails, scanned documents), applies workflows to streamline the processing of these documents via a queue-based interface, provides process monitoring and reporting views to various business roles, leverages retention policies to ensure regulatory compliance, includes high end search capabilities that allow for sophisticated queries based on extensive metadata contained in their shipment tracking database, and leverages Azure to accommodate the significant storage requirements.

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Overall the system allows for the collection, splitting, tagging, storage and retrieval of documents from anywhere via any device across all locations in both Canada and US. This entire solution was also made available to end customers via secure extranet, thereby providing self-service reporting and document retrieval capabilities to Willson's clients.

We originally built this solution for Willson in 2011 using SharePoint 2010 Enterprise as the platform with SQL 2008 in the background. Location-specific processing queues were created within SharePoint, and several mechanisms were implemented to upload documents into these queues in real-time: .NET event handlers were created to monitor file system drop folders for received faxes, invoices, and other customs docs, and the queues were email-enabled to allow direct emailing of docs from clients. Workflows were built to automatically group documents into document sets based on shipment ID, thus enabling all content regarding a given shipment to be conveniently referenced, processed, archived, and retrieved together as a set. Views were created of these queues to support the various job roles, and to ensure shipments were processed in a FIFO or ETA prioritization (depending on customer agreement). Once shipments were processed, document sets were round-robin archived into a set of site collections for long term storage and retained for the required 7 year regulatory period.

Between 2011 and 2015 we continued working with Willson to support and evolve the system:

- Designed and built a custom eBilling solution that integrated with their Dynamics GP accounting system to obtain invoicing details. For each invoice, our solution parsed the invoicing info to extract the shipment transactions covered by the invoice, queried SharePoint to download all relevant backup documents for each shipment, and compiled all this into a PDF billing package. This billing package is then uploaded into Azure, and an email is sent to the customer with the invoice PDF as an attachment and a secure link to allow download of the billing package from Azure. The download links automatically expire after 14 days, and the billing package files are automatically cleared out of Azure storage.
- Extended this eBilling solution to also batch print hardcopy billing packages, for those customers that still prefer to receive printed invoicing and backup docs. These print batches were automatically routed to the correct printers in either Canadian or US branches, to simplify mailing and avoid international postage charges. Billing packages were fully collated, with duplicates incorporated for filing with the government, allowing for easy packaging and mailing by mailroom staff.
- Created a web-based self-service portal (called *ShipCheck*) to allow customers to enter/configure their own shipments, and provide the necessary info & documentation to Willson electronically. This allows for faster processing times (and therefore cost savings) by both Willson and their customers. This portal runs entirely on Azure services, and integrates with the SharePoint back-end. The ease of use of this system has help Willson win new customers and drive much greater transaction volume overall.

Using the above solution, Willson has been able to avoid creating and handling millions of paper documents per year, which has resulted in significant benefits to the organization:

- paper storage costs were slashed by over US\$100,000 annually
- employee productivity improved by 25 percent
- customer response times have been greatly reduced, from hours (or even days, when a hardcopy had to be retrieved from a warehouse location) to minutes, and customer satisfaction has increased accordingly
- profit margins have increased, despite increased competition and industry pressure

## Key Benefits

- Paper storage costs were slashed by over US\$100,000 annually
- Employee productivity improved by 25 percent
- Customer response times have been greatly reduced
- Profit margins have increased, despite increased competition and industry pressure

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## Conclusion

Willson has also been able to drive new business based on improved customer services and support. And without the physical limitations of paper, Willson has been able to drive further business value by moving to a centralized shared service model, since staff can now access all documents from any location at any time.

Additionally, the use of SharePoint 2010 to build this solution has resulted in US\$200,000 of direct TCO cost avoidance as compared to competitive technologies.

Moreover, the dramatic reduction in paper consumption has resulted in a substantial environmental impact (i.e. millions of sheets of paper that are no longer consumed yearly).

By 2016 the system had grown dramatically, in both level of usage and total documents under management (20 million). On premise resources were strained and an upgrade was required. We therefore worked with Willson to migrate the ECM solution to SharePoint 2016 running on Azure Infrastructure-as-a-Service (IaaS). This major migration provided many benefits such as new SharePoint features, performance enhancements, greater scalability, improved access speeds at branches, and dramatically better resourcing agility. Using Azure has enabled us to fine tune the resourcing/performance of ECM and its related solutions, to respond to changing usage demands while driving infrastructure cost savings.

## About Itergy

Established in 2001, Itergy provides best of breed managed and professional services for Microsoft infrastructure technologies. Itergy manages client domain controllers in 65 countries on 6 continents



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