

# Clay Lacy Aviation Boosts Efficiency by Automating 95% of Invoices with OnBase and ABBYY FlexiCapture

Clay Lacy Aviation is the world's most experienced operator of private jets. They have been in the business for over 50 years and have over 700 dedicated employees committed to providing outstanding service and delivering "legendary aviation experiences" to business and world leaders, Fortune 500 companies, professional athletes, sports franchises, government agencies, celebrities, and dignitaries.

## OBJECTIVES

- Eliminate Reliance on Paper
- Increase Process Accuracy and Efficiency
- Support Long-Term Growth
- Provide Seamless, Outstanding End-to-End Customer Service

## RESULTS

- 99% of Invoices are Automated
- Rapid, Seamless Customer Service
- Processing Error Rate Down to 0.2% from 10%
- 100% Paperless Expense Reporting Process
- Support Growth and Increased Workload without Increasing Headcount

## The Client

Since its founding in 1968, Clay Lacy Aviation (CLA) has provided top-tier, personalized business aviation services to every client. Committed to delivering the highest level of safety, value, and service in the industry, CLA has solidified a reputation for being the world's most experienced private jet operator having flown for five U.S. Presidents and a British Prime Minister.

Today, CLA has grown to manage, maintain, and charter 125+ private jets from every major manufacturer. They serve high-net-worth individuals, from Fortune 500 companies to celebrities and professional athletes. With a host of available services customized to each client's needs, delivering superior customer experiences is a priority for CLA. In the past ten years alone, CLA has grown roughly 150%; however, as their business flourished and client demand soared, so did the paperwork being processed by their accounting department. In search of a better solution, CLA found their perfect match with Hyland's OnBase and ABBYY FlexiCapture.

## The Challenge

As CLA continued to grow, the number of employees on their accounting team remained the same size. It became difficult to manually keep up with the high volume of complex vendor invoices rapidly coming in from around the world. As a result, CLA's highly skilled employees were swimming in paperwork. Even worse, CLA's manual invoice process was experiencing nearly a 10% error rate.

After processing the vendor invoices, the invoices were consolidated into monthly statements sent to the clients known as Summaries, which range from 100-400 pages in length. Accounting personnel conducted numerous manual reviews before the Summaries were delivered to the clients on a monthly schedule. And with all the time it took to manually process and fact-check these complex invoices, meeting monthly deadlines was becoming a struggle. This tedious manual labor took time away from other valuable tasks like providing superior, personalized service to clients.

It was time for a change. In looking for a solution, CLA had three primary goals in mind:

1. Increase process accuracy and efficiency
2. Eliminate paper
3. Gain the ability to scale

To best execute these goals, CLA searched for solutions that excelled with precise front-end data capture technology, comprehensive workflow capabilities, and high-quality professional services offerings. At the end of its search, CLA chose OnBase by Hyland and ABBYY FlexiCapture to help them reach their ambitions for superior efficiency and accuracy.

**“When we first considered a workflow solution, it needed to address the inherent inefficiencies of a paper-driven, labor-intensive process that was susceptible to repeated inaccuracies. Furthermore, any viable solution must have scalability and capacity to manage the significant increase in transaction volume that we envisioned. Integrating OnBase and ABBYY into our operation allowed us to realize the full potential of an automated workflow solution that has proved to be nothing short of a gamechanger for Clay Lacy Aviation.”**

*Brad Wright, Chief Financial Officer, Clay Lacy Aviation*

## The Solution

### **STREAMLINED PROCESSES WITH WORKFLOWS**

OnBase's powerful workflow capabilities have provided CLA with extensive customization opportunities, which have been critical to creating the solution they rely on today. CLA has built workflows for almost every invoice type they handle. Along with automating the complex invoice summaries associated with every flight, CLA has created automated workflows for the invoices associated with insuring and maintaining their fleet of aircraft.

### **HIGH PRECISION CAPTURE**

A primary function of CLA's ABBYY FlexiCapture solution is for capture. As soon as an invoice is sent in by email, ABBYY FlexiCapture processes them automatically and sends them to OnBase. For most invoices, no human interaction is necessary. Capture technology also helps CLA to facilitate its expense report processing. Using a point-and-click interface with additional built-in validations, reviewers can quickly and easily review expense report submissions.

### **SEAMLESS INTEGRATIONS**

While ABBYY FlexiCapture has provided CLA with accurate data capture abilities, OnBase has provided a solid platform to integrate with. CLA has been able to integrate a variety of systems to OnBase. For one, CLA has a financial reporting system that they've successfully integrated with OnBase and Great Plains, CLA's accounting and ERP software system.

Another significant integration involves Expense Capture, where crew members upload expenses by taking photos of them on their phones, add in minimal information, and submit with the tap of a button. Once submitted, expenses run through FlexiCapture, CLA's custom OnBase technology, and are then integrated into Great Plains.

**“If Clay Lacy can integrate systems, we do it.”**

*Tom Duffy, Technology Process Improvement Consultant, Clay Lacy Aviation*

## The Difference

### ACCELERATED INVOICE PROCESSING

Today, CLA has been able to automate 99% of the invoices they handle. This accomplishment has led to significant time savings, improved accuracy, and other benefits.

### DECREASED PAPER RELIANCE

Before OnBase and ABBYY FlexiCapture, the routing, approval, and entry of invoices were entirely paper-based. With the high volume of invoices that CLA faced, this amounted to a lot of paper. This reality left them reliant on 27 3.5-foot filing cabinets to organize all their important documents. Now, the majority of invoices CLA receives from vendors arrive electronically. As soon as they are received, ABBYY FlexiCapture begins extracting the data and sends it to OnBase, which takes it from there.

Leaving paper expense reports behind has been another significant way CLA has slashed its paper reliance. Previously, CLA ran 25,000 paper expense reports annually, with each report consisting of 10-30 documents. Now, it's 100% paperless.

### RELIABLE ACCURACY: 0.2% ERROR RATE DOWN FROM 10%

With OnBase and ABBYY FlexiCapture in place, CLA went from a 10% error rate to 0.2% for their invoice processing.

When CLA's expense report reviewing process was manual, it was prone to errors like miscoding or billing the wrong client. But with FlexiCapture and OnBase, this is no longer a problem, and process accuracy has increased significantly. This improvement comes from CLA's OnBase integrations with Certify and Great Plains, as well as FlexiCapture's capture abilities.

Thanks to ABBYY's precise capture, CLA staff can rely on the solution to get the job done accurately without needing to make many manual adjustments. CLA has been very impressed with ABBYY FlexiCapture's superior capture abilities.

**"One of the things I like most with ABBYY  
is the accuracy of the capture."**

*Tom Duffy, Technology Process Improvement Consultant, Clay Lacy Aviation*

### ENHANCED EFFICIENCY OF PROCESSES AND STAFF ALLOCATION

OnBase and ABBYY FlexiCapture have eliminated a manual process freeing up CLA's team to focus on the customer experience. Even though CLA's growth has increased work volume, increases in staffing has been minimal.

In fact, OnBase and ABBYY FlexiCapture have made it so fewer employees are needed for some processes. For example, before the introduction of the two solutions, one process demanded three and a half full-time workers to manually execute. Now, with the solutions, Tom Duffy reports, "It now takes half of a full-time worker, and we believe we will be able to improve upon this further. As CLA continues to grow, their solutions have evolved alongside them, continually supporting them as their needs change.

**"Our fleet has grown from 50 to over 120 business jets,  
but this new automation has enabled us to keep staffing levels  
about the same, we can accommodate even more air-craft  
without needing to add employees."**

*Avel Trinidad, Manager of Accounting Business Services, Clay Lacy Aviation*

By automating high-volume, manual processes, CLA could invest and extend the workload of their existing talent rather than hire more employees as their business grows. This has allowed CLA to avoid associated costs and administrative burdens, while allowing the “human” work, like customer service, to flourish.

### **ENHANCED CUSTOMER SERVICE**

With the two new solutions, the overall customer experience for CLA clients has dramatically improved. The waiting period to receive bills is shorter than ever. The manual errors are gone. And with the time CLA employees are saving, they can spend more time and energy delivering outstanding service to each client. Even as demands continue to rise, CLA can provide the “legendary aviation experiences” they have been known for since 1968.

## **Leading Through Change**

With any Digital Transformation initiative comes resistance to change, and this was no exception for CLA. To navigate the unknown, CLA provided employees with full transparency from the beginning. This meant giving realistic timelines, providing thorough information, and answering questions every step of the way.

Employees were actively engaged with the project. One strategy included regular informational lunch meetings and review sessions. CLA also sought the input of employees who knew the processes best. For one business process that was set for automation, CLA worked closely with the people who had been involved in its manual processing. First, CLA documented each discreet manual step of the process. They then confirmed with employees that these steps were correct. Then, CLA began to automate each step one by one while inviting employees to ask questions and provide feedback. This slowed-down approach may have taken additional time to execute, but CLA sees it as a valuable step in the implementation process.

Another contributor to CLA's successful implementations has been their attention to including diverse perspectives. CLA regularly seeks the help of employees with different professional backgrounds representing everything from technical expertise to business and finance expertise. Throughout the planning, implementation, and beyond, these experts work in collaboration, sharing ideas and feedback. This strategy helps ensure the technology is being configured and designed in a way that not only works efficiently but meets the business' requirements as well.

## **Vision for Future Progress**

Currently, CLA is gearing up to do an upgrade of OnBase with assistance from Naviant. CLA looks forward to extending the benefits of these solutions to other departments. One long-term goal is to push OnBase into HR, Maintenance, and Operations departments. OnBase and ABBYY FlexiCapture have already made significant impacts within CLA, and there are no plans to stop anytime soon.