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Success story

Westgate Resorts

Industry
• Travel

Solutions
• OpenText™ TeleForm™
• OpenText™ LiquidOffice™

Partner Support
• Informa Software

WESTGATE RESORTS

Westgate Resorts leads way on digital transformation

OpenText TeleForm and OpenText LiquidOffice transform document processes for timeshare group

Results

$ **Reduces agent headcount** by 50 percent, resulting in significant savings

⏱ **Improves customer service** by cutting response times from two days to just minutes

👥 **Increases staff productivity** by replacing manual processes with automated workflows

"Being able to do the same workload with fewer employees was a big savings for us and, without a doubt, using the OpenText solutions has improved the service that Westgate can give to its customers."

Donna Larson
Print and imaging manager
Westgate Resorts

A leading timeshare enterprise in the U.S., Westgate Resorts was drowning in documentation and hampered by inefficient systems. By transforming document processes with OpenText™ TeleForm™ and OpenText™ LiquidOffice™ software, the hotelier has reduced costs, boosted productivity and improved customer service.

Challenge

Huge document volumes

In 1970, David A. Siegel started a real estate development firm in his garage and that was the forerunner of what has become a multi-million dollar timeshare enterprise. In 1982, he founded Westgate Resorts, a subsidiary of Central Florida Investments, which employs 9,500 people, operates 13,500 villas in 28 resorts and is one of the largest privately held corporations in the Central Florida area.

From its Orlando base, Westgate Resorts has established itself as a world leader in the timeshare and hospitality industry, with properties in Florida, Tennessee, Virginia, South Carolina, Missouri, Utah, Nevada and Arizona. A recent development has also seen this fast-growing company purchase Cocoa Beach Pier, a center for restaurants and bars on Florida's Space Coast.

Running an operation of this scope requires a huge amount of complex administration, as the company's print and imaging manager Donna Larson explained. *"We run the full gamut of documentation. It goes from our front desk registration slips and human resources, to customer correspondence and accounts payable. We scan all kinds of documents. Everything you can imagine."*

In addition to the wide variety, documentation volumes are also impressive. As an example, in April 2016, accounts payable processed 13,000 batches, each of which can contain anywhere from one to 30 individual documents. The timeshare operation dealt with 76,000 batches representing 160,000 documents just for their contracts alone.

Correspondence received by the company generated 5,000 batches with 14,000 documents and 18,000 vacation occupancy agreements. On top of that, 37,000 documents were generated by the front desk registration, travel club, tour and travel departments, and human resources for an additional 30,000 documents.

Dealing with this amount of documentation is a huge task, and Westgate Resorts' processes were not keeping pace.

"Documents were created in IT or in our creative design departments and from there they would be printed on location or printed centrally and distributed to the various departments," said Larson. *"They were filled out by hand or hand processed. For accounts payable, the invoices were retrieved and distributed through our inter-office mail system, which involved taking an envelope, putting the invoice in it and sending it out to the approver. The approver could be in Las Vegas, so it took a long time for them to code and approve the invoice and send it back. The process was very slow and prevented Westgate Resorts from taking advantage of money-saving early payment incentives that some of our vendors offer us.*

"Also, documents would be boxed up and stored in a warehouse, so if a customer called and had an issue the agent would have to request the box from the warehouse, which could take up to two days. Only then could they contact the customer to discuss the paperwork. It was all very inefficient."

> *"OpenText TeleForm and OpenText LiquidOffice have enabled us to save a lot of money, streamline our processes and increase our efficiency tremendously. They're also wonderfully easy to use."*
>
> **Donna Larson**
> Print and imaging manager
> Westgate Resorts

Solution

Digital transformation with TeleForm and LiquidOffice

Westgate Resorts initially implemented TeleForm, which automatically digitizes paper documents, and also recognizes and extracts data from any document for routing into back office systems and workflow processes.

"TeleForm was being used for cash receipt processing using Optical Character Recognition (OCR). When I came on board, we realized we could scan the contracts at the different contract locations throughout the country to eliminate mailing paper back and forth, which cut out the manual labor and storage," said Larson.

The versatility of TeleForm played a big part by enabling Westgate to move from OCR to barcode reading for its contracts projects. It was able to set up the documents with barcodes, which TeleForm could recognize, and upload them into its document retrieval application. Additionally, multi-function copiers were set up in various locations to allow employees to scan their documentation and process it directly into TeleForm Verifier.

"Having used TeleForm for eight years, we saw a need to make processes electronic in our accounts payable department that could enable us to reduce staff and make the process more efficient. We started researching companies that could meet our needs and then interviewed them to narrow it down."

Westgate decided to work with Informa Software to implement LiquidOffice because it offered a customized approach that delivered workflow via email and the web. LiquidOffice is a web-based solution that enables the creation and routing of electronic forms, and offers end-to-end business process automation leveraging integration with most back-office systems. Seamless integration with TeleForm helps customers bridge paper and digital worlds.

"We use LiquidOffice in conjunction with our work management program in accounts payable," explained Larson. *"The AP agents scan invoices as they come in. They go into the work management program, and from there it's determined whether coding and approval are necessary. They are sent out to the different approvers via LiquidOffice, coded and approved by them, and sent back for further processing and payment in our work management system. The process is further streamlined by the use of digital signatures."*

Benefits

Improved service at reduced cost

Implementing TeleForm and LiquidOffice has enabled Westgate Resorts to deliver improved customer service with fewer staff. The team of 12 full-time agents has been reduced to six—a result that was achieved through attrition.

"Being able to do the same workload with fewer employees was a big saving for us and, without a doubt, using the OpenText solutions has improved the service that Westgate can give to its customers," said Larson. *"There is no longer the need to retrieve paper documents from the warehouse. When customers call in with a question or a dispute, the agents are able to bring that paperwork up in seconds and deal with it right away versus a two-day turnaround."*

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New employees also benefit because Westgate can prepare their hire paperwork right away. For its customer service base, the company has reduced the risk of errors and misplaced documentation because now it can bring these documents in, use OCR on them and store them electronically.

"Over the years, we have also been able to consolidate and standardize many documents, which means we can store and reference them, and access them more easily," Larson said.

The quality of data loaded into back-end systems has also improved and Westgate Resorts is impressed by the versatility of these OpenText products.

About Informa

Informa Software provides business productivity solutions including content management, document imaging LANfax, data capture and business process automation. Informa focuses on three main business solution offerings—software product development, partner solution integration and systems application consulting—providing the tools, personnel and business expertise to allow companies to reduce operational costs, manage risk and maximize productivity.

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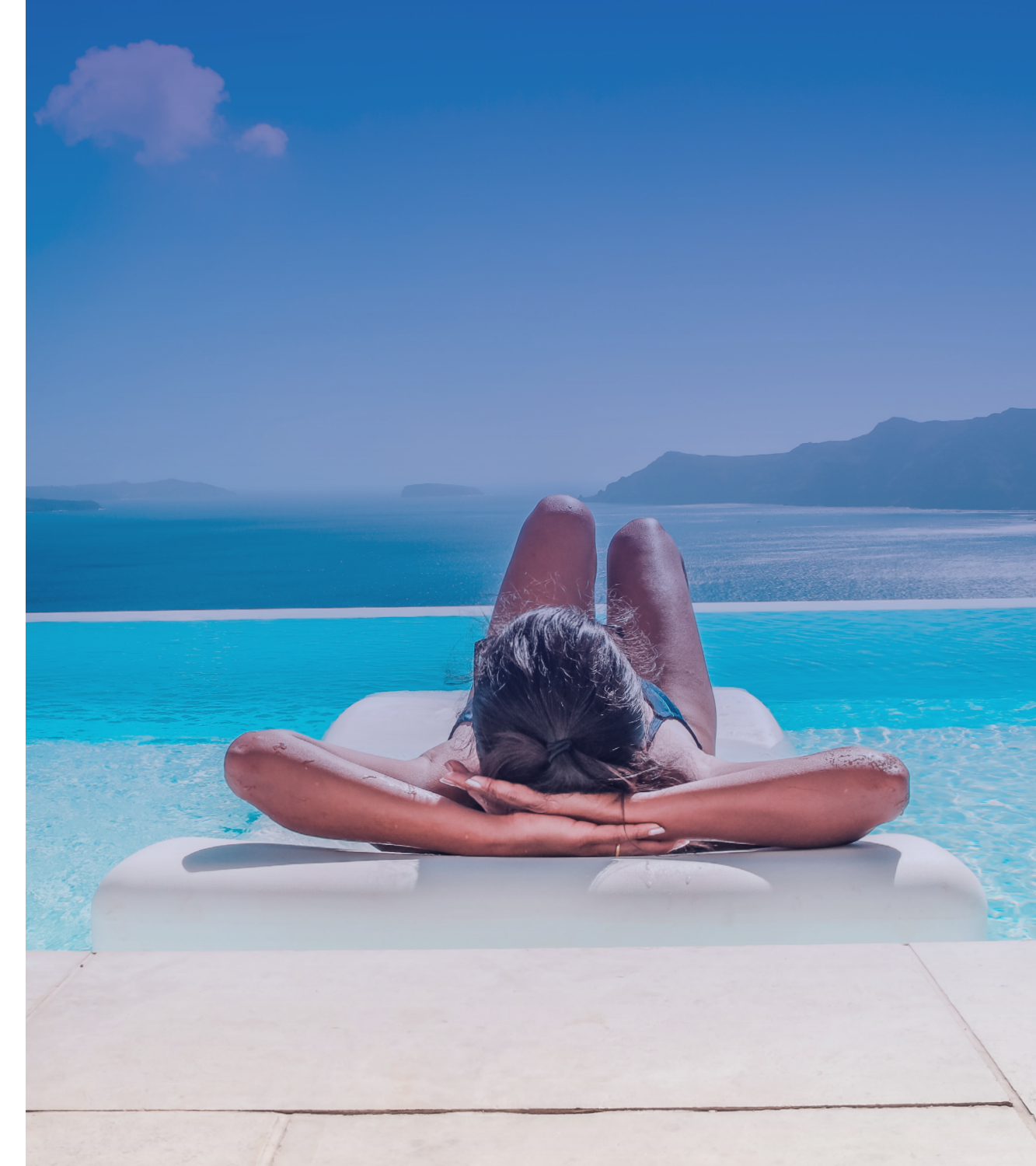
About OpenText

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