

# 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 Challenge

For any customer support team, top-level service begins with having secure access to customer information and data at a moment's notice. Paper-based records and files slow down the process – if they can be found at all – and puts the security of the contents at risk. This was the challenge that Pearl Motor Company faced when trying to provide strong customer service 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 and space devoted to paper files by implementing Upland Software's FileBound solution to manage documents.

## The Solution

Instead of maintaining paper-based files, Pearl Motor Company worked with Missouri-based FileBound solution partner Paper Free Office Solutions to begin digitizing active records to electronic documents for storage in Upland's FileBound secure cloud.

## Benefits

- **Immediate access** to all customer records and data empowers staff to deliver a high level of customer service
- **FileBound's Secure Cloud** ensures that personal information, such as credit data, is always protected
- **Eliminating paper-based records** allows Pearl Motor Company to make better use of space by expanding business operations
- **Cloud-based software** provides business continuity and disaster recovery of important customer records so the Pearl Motor team can rest easy

## 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.

“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

Around 1916, when Pearl Motor Company was founded, manufacturers began to use machine-tooled parts, which made cars more affordable and less dangerous. To this day, Pearl Motor still offers residents of Missouri the latest in automobile technology, but have paired that with an emphasis on customer service that also leverages the latest technology.

“From my research I knew about the emerging benefits of cloud – lower 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 scan all 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 Fujitsu scanner, a part-time staff member is also working on back scanning existing records.

## Improving customer service with electronic records

Digitizing records makes the sales process easier for staff and customers. “If someone 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.”

FileBound also provides security for personal financial information, and 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.”

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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 has been nice having the bulk of our paper eliminated,” said Huffman, “The car business has become complicated enough, and this is one thing that makes it easier.”



## About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland’s solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.