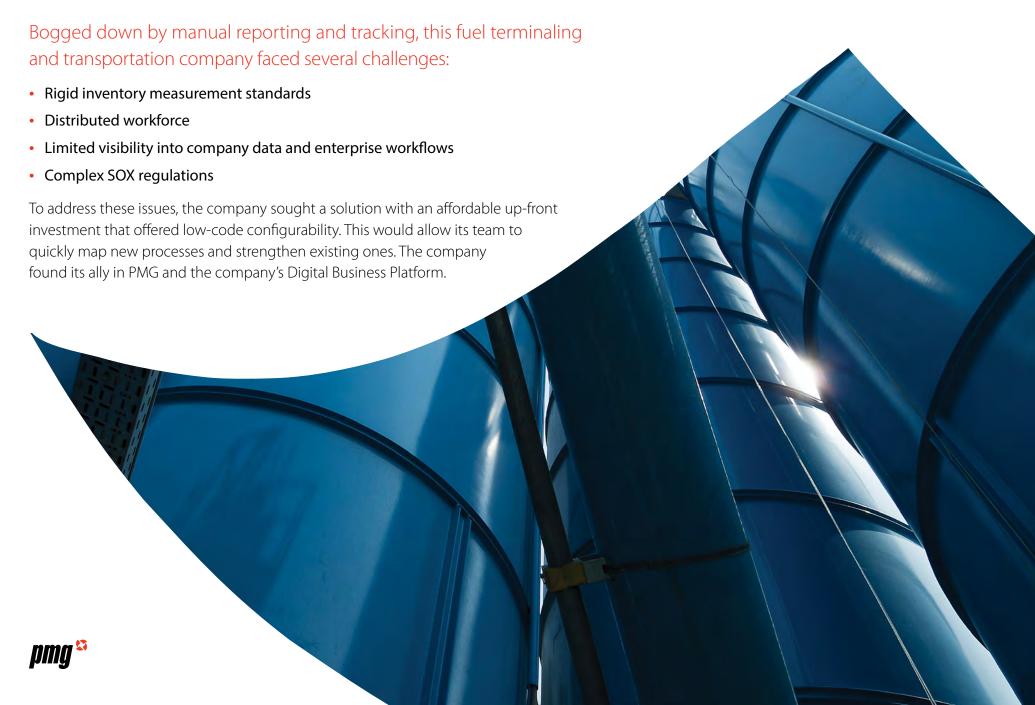




# Surveying the Challenges at Hand



# Finding the Right BPM Partner

With an eye on finding a true BPM partner, this national energy transportation company began an extensive online search, examining functionality, value and implementation times.

"PMG quickly separated itself from the pack. The software is easily configurable, so it promised to support our lean project approach to streamline our processes and compliance efforts," said the company's solutions manager. "The solution also offered a manageable financial entry point, versus the major investment required from custom solutions."

"PMG quickly separated itself from the pack..."

—SOLUTIONS MANAGER



### PMG Digitalizes Inventory Tracking, Work Management

Rigid inventory measurement standards. High-value shipments coming in and out daily. And a workforce distributed across more than 50 terminaling locations throughout the U.S. Working for this leading fuel terminaling and transportation company is anything but low pressure.

Previously, the company used Excel documents to manually track and share all incoming and outgoing inventory. These reports were then manually shared internally to drive the creation of work orders to establish day-to-day priorities. Ultimately, this limited the visibility and forecasting abilities of the management team.

Seeking greater efficiency and process simplicity, the company worked with PMG to digitalize inventory tracking and work order process at one of the company's major terminaling hubs. The team began with a single plant location that processed more than 1200 operations orders annually, creating front-end forms for better tracking of inventory and easier work management. Now, the PMG platform captures this data, allowing company leaders to view all reports in a real-time informational dashboard for up-to-the-minute insights on incoming and outgoing shipments.

Next, the team automated the generation of all work order documents using PMG's workflow designer, simplifying the creation process while using shipment data to create a more informed day-to-day action plan.

"Talk about seeing immediate value. With an easier way to track and view the data, we not only strengthened internal communications, but we also expedited back office operations, such as customer billing," said the solutions manager. "It's easier, because everything happens in one shared, universal system accessible for our dispersed workforce." With help from PMG's Digital Business Platform, the company has reported savings of 83 percent across its processing times.

83%

REDUCTION IN

REDUCTION IN
INVENTORY TRACKING
PROCESSING TIME





#### When Enterprises Catch the Automation Fever

Having recently digitalized and automated key inventory reporting and work management processes, the company set out to duplicate this success with its purchase orders process.

As with the work order process, purchase orders relied on a lengthy paper trail with a varying number of touch points. And whether the purchase order was for \$5 or \$5,000, it could take weeks or months to complete the process from start to finish.

PMG's Digital Business Platform again proved its worth. Due to the platform's configurability and ease of use, the energy transportation company was able to quickly build a purchase order process by using earlier initiatives as models.

Soon, the team automated document creation and delivered activity-triggered notifications. This forced employees to use a standardized form while notifying the appropriate contact when their approval was needed, accelerating the purchase order process.

While the company enjoyed speedier turnarounds and simpler approvals, the accounting department soon noticed another benefit – the ability to immediately flag fraudulent purchase orders. Because PMG's platform allows users to all see and view a myriad of attachments, accountants suddenly had easy access to all purchase order information, allowing them to more quickly notice and rectify discrepancies.

63%

REDUCTION IN
PURCHASE ORDER
PROCESSING TIME



Speedier Turnarounds



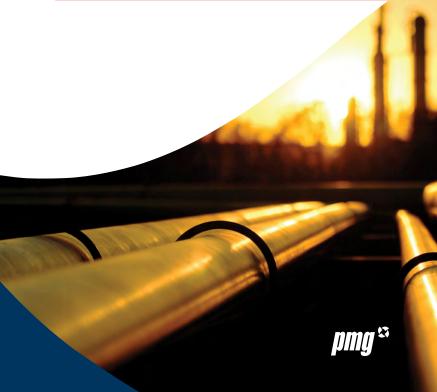
Simpler Approvals



Easy PO Info. Access



Immediate Fraud Flagging



# Simplifying SOX Compliance

Having successfully automated three distinct processes (inventory reporting, work management and purchase order requests) this national energy transportation company decided to drill into its next big initiative: simplifying SOX compliance. The company needed a way to create universal, digital processes to help drive efficiency and streamline compliance reporting. And accurate reporting was a must.

All public companies know the pressures associated with SOX compliance, yet for the fuel terminaling and transportation industry there's a very narrow margin for error. To ensure inventory accuracy, the company constantly calibrates its fuel meters to tight specifications, a process that had long lived in paper copies and Excel. However, rather than simplify the process as the company had done with previous initiatives, the team was intent on adding process rigor for better reporting and tracking of contractor performance. By creating a series of dynamic front-end forms to capture all calibration data, the company soon saw its calibration reporting dramatically improved with greater accuracy and efficiency.

The company also makes the most of PMG's extensive integration capabilities, using the technology to integrate with disparate, external databases. This allows company leaders to view aggregated report data in a real-time informational dashboard for up-to-the-minute insights, ensuring proper compliance.

In addition, the company sought a better means of processing meter calibration waiver requests. If for some reason a terminal cannot adhere to guidelines, the terminal documented the reason with a waiver request. The waiver request then went through a multi-level review process, which lived in Excel and carried the burden of a multi-touchpoint paper trail.

Using PMG, the team automated document creation and built workflows to ensure the requests continued moving from creation to the final approval. However, the real value lies in how PMG has allowed the company to time stamp, track approvals, capture request notes and then conveniently store this information on a company server.

Overall, the team reports on PMG accelerating the process by 67 percent. And now if an auditor needs the information, team members can quickly access the data and write reports from the data which is stored on a company server.

# REDUCTION IN METER CALIBRATION REPORTING PROCESSING TIME



# Keeping the Efficiency Going

While the energy transportation company has seen major efficiency gains across core processes from inventory management to meter calibration reporting, PMG's value has quickly expanded to other areas of reporting as well:



79%

AVERAGE REDUCTION IN REGULATORY REPORTING PROCESSING TIME



94%

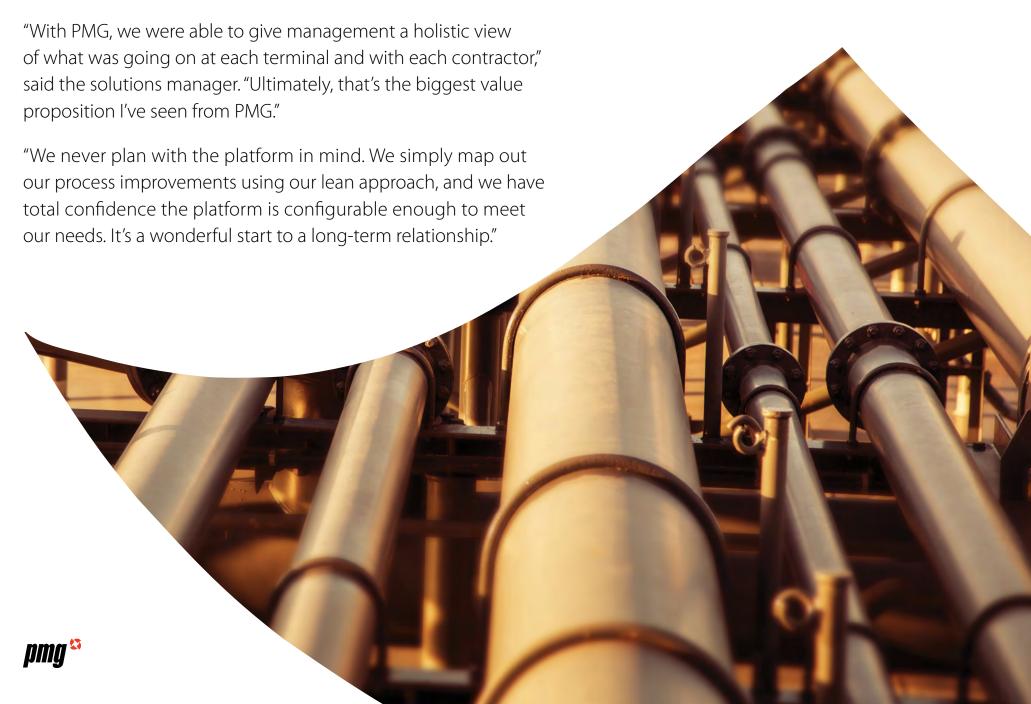
Monthly

Reports

Regulator



# A Flexible Platform for Your Digital Needs



#### **ABOUT PMG**

The Global 2000 rely on PMG's Digital Business Platform to streamline operations and increase ROI. By automating processes and integrating systems while improving user experience and enhancing collaboration, PMG delivers better results, faster, to business and IT managers. Our low-code BPM platform is configurable and supports constantly evolving business needs for solutions ranging from case management and compliance to IT process automation and HR enablement.

