

# Franklin Foods



## Company Facts

### Overview

- Location: Boca Rotan, FL
- Industry: Food Services
- Website: [www.franklinfoods.com](http://www.franklinfoods.com)

### Success Highlights

#### Challenges

- Ineffective paper-based financial processes
- Arbitrary credit approval policies
- Resources wasted on inefficient procedures

#### Solutions

- Epicor ECM (DocStar) Content Management
- Epicor ECM (DocStar) Intelligent Data Capture

#### Benefits

- Digitized, paperless processes enhance productivity and sustainability
- Streamlined, well-defined credit memo workflow
- Resources freed to invest in strategic priorities



## Cream of the Crop

How does a 124-year-old passionate, cream cheese-creating company continue to grow and stay competitive? With a commitment to producing the highest quality products and protecting the planet's future—as well as a healthy application of technology.

In 1899, Franklin Foods began producing cheese in the rolling dairy hills of Franklin County, Vermont. Now a proud subsidiary of Hochland, one of the largest cheese manufacturers in the world, Franklin Foods continues to evolve its traditions to thrive in an ever-changing marketplace.

One significant shift has been the conversion of manual, paper-based systems into automated, digital processes. To deploy this transformative initiative, Franklin Foods turned to Epicor and Epicor partner, Mosaic.

Sara Anderson, Assistant Controller at Franklin Foods, shared, “Several years ago, we adopted Epicor Content Management (ECM) and Epicor Intelligent Data Capture (IDC) to eliminate labor-intensive, error-prone and time-consuming manual document processing in our AP department. Now, instead of spending most of its time processing invoices, AP is free to work on higher-value responsibilities such as financial analysis.”

Additionally, the effort has supported Franklin Foods’ sustainability efforts by dramatically reducing the use of paper and printer toner, as well as energy usage.

### Success Breeds Success

The success of the AP automation project spurred the launch of a new effort to overhaul Franklin Foods’ credit memo procedure and resulted in the creation of a brand-new Epicor ECM workflow.

Previously, when a customer wanted to return an order or request a credit, the process was haphazard and inefficient. “Often we didn’t know about a credit until the customer didn’t pay the invoice in full,” Anderson explained. “There was little visibility into the status of a credit, it was unclear who could approve them and too often credits were being granted that should not have been.”

Anderson, who had demonstrated her prowess on the AP automation implementation team, identified the necessary workflow and collaborated with Mosaic to refine it. Then they worked with DocStar to deploy the new methodology.

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—Sara Anderson, Assistant Controller, Franklin Foods

She observed, “We revised our credit policies at the same time as the workflow. DocStar facilitated that because we did not have the visibility before to enact certain rules. Now, we can easily see the status, and we have a clearly defined three-level confirmation process that does not allow random approvals to sneak in.”

### Centralized, Streamlined, Intelligent

Document packages to support the credit memo process were an unexpected and welcome feature of the new workflow. “The package enables us to have all the files and documents associated with a credit memo in one central place. It is very useful because credit memos tend to have a lot of information and the package feature gives us confidence that each set is complete,” Anderson remarked.

Another key benefit of the new workflow comes in the form of insights that are shared back to the plants for quality improvement purposes. “The new DocStar workflow allows us to easily discern patterns in credit memos, such as type of claim,” Anderson described. “Then, we can identify and initiate a deep dive investigation to understand if a particular plant, or a certain process, need to be adjusted.”

### Change Management Experts

With DocStar, the Franklin Foods finance team has incited an automation revolution that has digitized rote tasks and liberated staff from stacks of paper and filing cabinets. Building on the momentum, Anderson’s next project is to connect accounts receivable in DocStar to the accounting software and extend the benefits of automation.

This sustained forward progress is critical as Franklin Foods continues to grow, enabling employees to work on highest-and-best-use assignments. Anderson revealed, “We used to have one person in each finance department, and now, even though we are automated, we have added people across the team. DocStar solutions have allowed those new hires to work on greater-benefit priorities, such as cost-saving initiatives.”

The success of Franklin Foods’ automation efforts is owed to the strategic partnership between itself, Mosaic and DocStar. Anderson highlighted, “DocStar listens to customers and works with them to create new solutions that boost productivity, drive efficiencies and cost savings.”



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