

*The roofing company Klemens Ott optimizes all business processes by using a highly flexible DMS and secures a top position within the industry thanks to the innovative digital power it has gained.*



**Sandra Schüßler, Business Process Manager,  
Klemens Ott GmbH, Miltenberg, Germany  
is open for innovations like a modern DMS**



„In order to operate successfully as a mid-sized business, you have to have your finger on the pulse. With DocuWare, we have a powerful tool at our disposal to promote both customer loyalty and employee motivation.

With DocuWare, we were able to map out and optimize all the processes defined in our quality management manual - quickly and easily - in a digital form.“

**KLEMENSOTT**  
Dächer ohne Kompromisse



**Country:** Germany  
**Industry:** Services  
**Deployment:** On-Premises  
**Department:** Administration,  
Human Resources,  
Project Management

**Being open to new ideas is an important success factor for Klemens Ott, the roofing company founded in 1960. The company's 50 employees offer customers complete solutions for renovation, waterproofing and roofing as well as facade design and building protection.**

Strong growth, ever more complex projects and stricter documentation requirements all translated into an explosion in documentation. When a software program they originally used to digitize their documents began reaching its limits, they decided to completely restructure their document management process. They were looking for an innovative document management system (DMS) that would not only guarantee future security with its high functionality and scalability, but would also be highly accepted both by the administration and by the roofers working on construction sites. DocuWare prevailed in the selection process against well-known alternative products. In addition to the scope of services and the well-structured user interface, the decisive factors were its easy integration into existing IT infrastructures and a high degree of adaptability.

During DMS implementation by the DocuWare Partner, the processes defined in the Quality Management Manual were digitally mapped, tested and optimized in the system, while existing documents were imported into DocuWare.

*"We were looking for an innovative ECM platform that would not only guarantee future security through its high functionality and scalability, but would also be me with a high level of acceptance because of its intuitive interface."*

Today, the mid-sized company uses a total of four main electronic file cabinets for projects, administration, personnel, along with fleet, machinery and occupational safety. Paper documents are digitized using eleven desktop scanners at different workstations. In addition, a standard interface provides integration into an industry solution specially developed for the trade.

#### **Completely digital project folders**

In parallel to the introduction, the company defined digitization guidelines for all operating areas. The spectrum ranges from accounting - where around 4,000 incoming invoices per year are checked and booked via Intelligent Indexing - to the personnel department, which now only works with digital employee files. Completely digital project folders in the company is also key. DocuWare assigns a unique project number during the registration of a prospective customer inquiry, enabling secure document access - even via tablets and directly from a construction site. Individual processing steps are supported by automatic workflows, notification emails and digital stamps. Klemens Ott also takes advantage of the ability to create custom web forms. They form the cover sheets of all digital project folders and provide information at a glance about contact data, contract conditions or important milestones. Similarly, web forms are

*"After almost two years of use, the number of digitized documents had already risen to more than 50,000. We estimate the annual growth rate to be 20,000, with an upward trend. These figures document a clear success story for our company."*

used in internal employee communication, for example when it comes to vacation requests, ordering uniforms, or suggestions for improvement.

### **Better for the environment**

By implementing several digital workflows, the original objectives of greater efficiency, transparency and service orientation have been significantly exceeded. By largely doing without paper, Klemens Ott is also helping the environment. And there is no shortage of other innovative ideas for expanding digital document management. This includes the implementation of completely digital application management as well as the integration of the time recording solution REAL TIME in order to store daily construction records directly in digital form.

*"In the mid-term, we want to expand the system into an internal knowledge database, where colleagues can find all their guidelines or forms as required and where they can, for example, access training documents."*



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