kefron

Customer Story

ALLEGO

Overcoming Operational Challenges Through Automation

Customer Background
Allego

Allego, founded in 2013, is dedicated to leveraging technology to enhance learning, communication, and collaboration within businesses. With over a million global users, it has been recognised as the #1 Sales Enablement Platform by G2.

Operating with approximately 250 staff in the UK and US, Allego stands as a technology-driven enterprise committed to equipping its workforce with cutting-edge digital solutions. One such solution is their ERP system, Sage Intact, widely utilised by software companies for its high customisability and numerous integrations.

Customer Situation
Main Challenges

As Allego experienced rapid growth, including the acquisition of a UK company, the need for tighter cost control became increasingly apparent.

> *"Having a more processed and professional approval process was crucial for us. It would enable us to enhance planning, budgeting, and budget monitoring."*
>
> **Nathan Chalk, EMEA Finance Manager**

Primary Objectives

CUTTING DOWN ON MANUAL DATA ENTRY
Allego's skilled finance team was spending excessive time on manual data inputting. Nathan admitted, "AP was taking up more and more time and our team of quite experienced people were spending a lot of time doing very manual jobs of inputting coding of transactions." This prevented them from focussing on strategic initiatives.

VISIBILITY INTO THE APPROVAL PROCESS
The previous manual approval system lacked transparency and an audit trail, leading to inefficiencies and potential errors. It was impossible to discern who had approved an invoice and whether it had obtained all necessary approvals.

REDUCING DUPLICATES
As with any busy organisation, Allego struggled with duplicate invoices. Their AP team devoted significant time rectifying these duplicates, ensuring no payments were duplicated. This was diverting valuable resources and time.
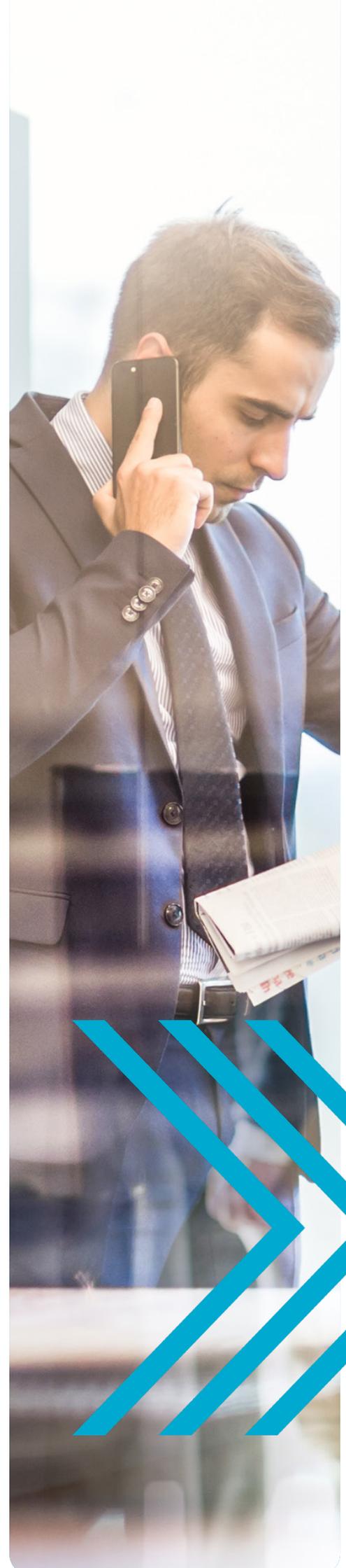
The Solution
Invoice Automation

After market research and vendor discussions, Nathan presented potential solutions to his US counterpart and Allego's CFO. They identified Kefron as a promising solution, particularly impressed by its successful engagement with Allego as a customer and its proven seamless integration with Sage Intact.

Kefron's managed service involved collaborating with Allego's finance team to identify necessary data extraction requirements. The invoicing process remained unchanged for Allego's suppliers, with emailed invoices automatically forwarded to Kefron for extraction, while physical invoices were scanned and uploaded directly.

Kefron's dedicated product developers continuously optimise their AI software for accuracy and efficiency, relieving clients from the need for manual software training. Once data extraction is completed, Kefron AP integrates seamlessly with Sage Intact, checking the data against the supplier data in Intact and against Agresso's business rules, for example, flagging duplicates.

Kefron AP notifies approvers via email following this process, with regular customisable reminders. The automated reminders ensure timely approvals, with invoices then posted to Sage Intact for payment.

Sage

> 66 *Following demos and discussions with Kefron, we quickly realised that having looked at the market, Kefron actually did exactly what we were looking for in the solution.*
>
> **Nathan Chalk, EMEA Finance Manager**

How Did it Turn Out?
The Key Benefits

By implementing Kefron AP, Allego has revolutionised its AP operations, achieving greater efficiency, transparency, and cost savings, while enabling its finance team to focus on strategic initiatives.

Changed the Structure of Accounts Payable

Kefron AP provides increased visibility to Allego with a comprehensive audit trail and history tab.

> " *You can see the journey a document has taken. You can also see if it came in by email, the text of the email it came with.*"
>
> **Nathan Chalk, EMEA Finance Manager, Allego**

There is full visibility of documents throughout the process, providing comfort to Allego staff and their suppliers. Supplier queries are reduced as the automated process and increased visibility better ensures on time payments and allows suppliers to view their invoices' progress in the AP process.

More Flexibility

With a fully automated cloud-based system, Allego's team can access Kefron AP from anywhere on any device with internet. With a small team, it's important to have good redundancies in place. Kefron AP better allows for cover when people are on leave or ill.

With invoices automatically forwarded to Kefron, Allego's staff don't have to worry about logging into colleagues' email accounts just to access and approve invoices. The streamlined process provides ease of mind to Allego's finance team.
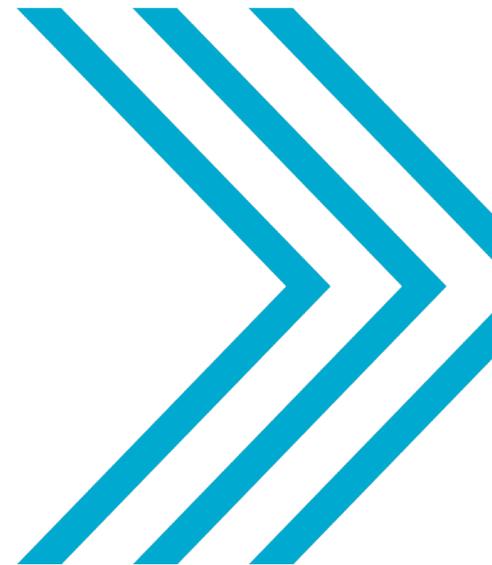
Time & Cost Savings

By automating AP processes, Allego's finance team can redirect their efforts towards high-value tasks, resulting in significant efficiency gains and cost reductions.

Backup approvers minimise delays in the approval process, ensuring business continuity and prompt payments. Kefron AP flags duplicates to Allego staff, saving further time and ensuring multiple payments are not made for the same invoice.

> *You feel happier taking a day or a week of annual leave without feeling like everything's going to collapse."*
>
> **Nathan Chalk, EMEA Finance Manager, Allego**

Kefron

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