

Customer success story

TATA UK

Industry

General Services



Wholesale & Distribution



Finance & Insurance



Location

United Kingdom

Greentree product suite

Financials

Supply Chain & Distribution

Job Costing

CRM

Workflow

eBusiness

Business Intelligence

# TATA'S CHOICE OF GREENTREE THE RIGHT DECISION

Tata Ltd stuck to its guns, opting for a business system that was fully integrated, intuitive and user-friendly.

**CHALLENGE** Tata Ltd's aging systems couldn't cope with increasing workloads from rapid customer expansion, and lack of integration just added to the burden.

**SOLUTION** Greentree's fully integrated Financial Management, Customer Relationship Management and Supply Chain & Distribution, coupled with Workflow, make for a streamlined operation.

**RESULTS** Multiple data entry is eliminated, complex shipping and insurance documentation is compiled and delivered hassle-free and despite a 30% increase in workload, no more staff are required.



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Kamal Desai, Procurement Manager  
Tata Limited

Tata Ltd, the London-based procurement arm of the Indian global conglomerate, was sticking its neck out when it went shopping for a new ERP system and ended up recommending Greentree.

"The lack of profile for Greentree was an issue particularly with our higher management, as it was really unheard of in the UK," says Kamal Desai, Tata Ltd's Procurement Manager.

But Kamal and his team wanted a system that suited their needs. It had to be intuitive and easy to use, especially for staff who were not especially computer-literate. The final choice was between Greentree and SAP B1, and when Greentree

was named as the preference, senior management started asking why.

"Immediately the questions came: who are they, what do they do, why aren't we going for SAP, everyone uses it," Kamal recalls.

## Reassurance from the top

So Kamal went hunting for proof that Greentree was the right move. He ended up talking with Greentree's senior management, and discovered a company with a sound financial base and track record, and a progressive outlook on technology's changing roles.



"We were impressed by Greentree's efforts to talk to us and demonstrate that we weren't just punting into the dark," he says. "We could see that Greentree has both a strong history and a future that it's working towards – the percentage of funding that it puts into development is higher than most other software companies.

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### A global concern

Tata has massive worldwide interests that include the steel, chemical, automotive and power industries. Tata Limited was established in London in 1907 as the conglomerate's representative in Europe, and has become a service provider for many Tata companies.

"We source material and equipment, procure it and arrange for its despatch to India – anything from nuts and bolts and bearings, up to full plant equipment or even a complete new establishment," Kamal explains.

Tata Ltd's London offices process upwards of 4000 orders a year from the company's headquarters in India, generating over 5000 shipments worth

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£160-200 million. Each order requires its own set of documents, which include shipping instructions and insurance.

### Mounting mistakes

The procurement staff were using an aging bespoke system while the finance staff were using Sage, and there was no connection between the two.

"If we had one figure coming out of one system and a different figure going into another system, it was very difficult to then trace back, find and resolve mistakes," Kamal says.

The systems were slowing down due to increased workloads brought on by the growth of Tata's

companies, and the lack of automated checking just added to the potential for errors.

"There were no lockdowns of the correct manner for making changes to invoices," says Kamal. "Someone could just change an invoice, print it out and send it, with no way for anyone else to know if it was correct. It was a very slack method of operation which we couldn't allow to continue. We needed a system that essentially forced us to operate in the correct procedures."

### Customers better informed

Greentree's Workflow active desktop, with its Approvals & Alerts function, was the obvious answer to that particular problem. Workflow's powerful search capability has also streamlined the checking process, removing the need to hunt through paper files.

"It's now much easier to keep our clients informed," says Kamal, "and Greentree's total integration means we're also saving time through not having to re-enter the same piece of data over and over."

The Greentree Partner set up a special "Shipping Screen" in Workflow, allowing Tata Ltd's staff to generate the invoice, insurance, shipping and supplies



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information in a single document, with Approvals & Alerts checking each stage, simplifying what used to be a tricky and time-consuming process.

Staff at Tata’s offices in India, China and the USA are able to access Greentree through remote online desktops, so orders coming in from different time zones can be checked and approved as soon as the London staff log into the system.

### More work - no problem

“Since the introduction of Greentree we’ve had about a third increase in our workload, and yet we haven’t had to increase staff,” Kamal says. “We can answer queries from our customers about the progress of

orders without having to say, ‘give us a couple of days while we try to find the files.’”

Kamal also reports “massive” time savings in the generation of monthly, quarterly and annual reports, switching from manual spreadsheets to straightforward exporting out of Greentree. A three to four-day task has been reduced to a single day.

Kamal says today he feels vindicated in his decision, and pleased that he made the effort to check Greentree carefully.

“Greentree has made us more efficient, it’s saved us time, and it’s allowed us to service our customers in a more professional manner.”

## TATA

Tata Limited provides the interface between Tata in its home market and its various operations in the UK. Tata Limited has expanded beyond its traditional purchasing activity by introducing sophisticated systems, and now offers comprehensive and highly specialised services that cover almost every type of industry and activity, including procurement, freight management, insurance and finance. <http://www.uk.tata.com>

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