



CASE STUDY: Document Manager™ – Sytner



Company: Sytner

Country: UK

Industry: Automotive

Profile: Sytner Group Ltd, a leading automotive retailer, sought to modernise its Human Resources (HR) document management system to enhance efficiency, ensure compliance and reduce reliance on paper-based storage.

The organisation partnered with Document Logistix to implement an advanced document management solution integrated with its existing MHR iTrent HR system.

Transforming HR Document Management at Sytner Group Ltd

Challenges

Before the implementation, Sytner Group's HR department faced several challenges:

- Inefficient manual handling of employee documents.
- Limited accessibility to critical HR documents for managers and staff.
- Security risks related to physical document storage.
- Compliance concerns, particularly with GDPR regulations.
- High costs and space constraints owing to paper-based document storage.



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The primary goals of the project were:

1. Seamless Integration

Implement a document management system that integrates with iTrent HR and Microsoft Office.

2. Enhanced Accessibility

Enable secure access to HR documents through iTrent and Document Manager Web Client.

3. Improved Security

Restrict document access to authorised personnel only.

4. Space Optimisation

Eliminate paper-based storage to free up office space.

5. Process Efficiency

Streamline HR operations for onboarding and offboarding employees.

6. Regulatory Compliance

Ensure GDPR adherence through structured document management.

7. Cost Reduction

Minimise costs associated with document storage and processing.

Multi-site HR Document Management Issues

As an organisation with 50 locations, Sytner faced issues common in businesses with dispersed sites.

Managing HR documents across multiple sites without centralisation creates significant challenges. Without a unified system, records may be inconsistent, duplicated or even lost, which leads to compliance risks and inefficiencies.

Accessing and updating employee files becomes time-consuming, as documents must be physically transferred or requested from different locations.

Security concerns arise owing to the lack of standardised storage and access controls, which increases the risk of data breaches or unauthorised viewing.

Additionally, coordinating policies and ensuring adherence to legal requirements across sites is difficult without a centralised framework.

The absence of real-time updates means outdated information may circulate and potentially lead to miscommunication and errors.

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Implementation Strategy

Document Logistix executed the project using a structured approach:

- Conducted a project analysis with Sytner Group's HR team to define requirements.
- Installed and configured Document Manager Web Client, Capture application and Office Add-in.
- Integrated the solution with iTrent for seamless document retrieval and management.
- Trained HR staff and managers to use the new system effectively.
- Established security protocols to ensure data protection and compliance.
- Implemented additional system components, including:
 - **Document Manager Retention Service**
 - Applies and executes document retention and purge policies.
 - **Post-installation Support**
 - First-line support handled by MHR, with additional assistance from Document Logistix if needed.
 - **Comprehensive System Documentation**
 - For use by helpdesk staff and HR personnel.

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“Implementing a digital document management solution with MHR and Document Logistix has completely transformed the way we manage HR records. We’ve significantly improved efficiency, reduced compliance risks, and eliminated the burden of physical document storage. The ability to quickly access and securely manage employee files across multiple locations has been a game-changer for our HR team. This project has been a crucial step in our digital-first strategy, ensuring we remain agile and future ready.”

**Paul Hudspith, Head of
Recruitment and HR**

Success Metrics

The project's success was evaluated based on the following criteria:

- **Storage Space and Cost Reduction**
Reduced reliance on offsite storage and freed up HR office space.
- **Security and Compliance**
Enhanced document security aligning with GDPR requirements.
- **Business Process Improvements**
Eliminated duplication in record-keeping, ensuring efficiency.
- **User Adoption**
HR staff successfully transitioned to the digital document management system.

Results and Benefits

Post-implementation, Sytner Group achieved significant improvements:

- 95% reduction in HR paper storage.
- Improved document retrieval time that enhanced HR productivity.
- Secure and streamlined document management that reduced compliance risks.
- Simplified onboarding and offboarding processes that ensure operational efficiency.

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Sytner Group HR Document Management Project: Conclusion

By partnering with MHR and Document Logistix, Sytner Group Ltd successfully transformed its HR document management and achieved increased efficiency, security and compliance.

The implementation has paved the way for a more agile and digital-first HR function that ensures long-term sustainability and cost savings.

Digitising Legacy Records

The Sytner Group was fully committed to a digital-first strategy. In order to realise its transformation objectives, the Group commissioned Document Logistix to back-scan and categorise two million paper HR documents in Document Logistix' in-house scanning bureau. The speed and classification accuracy of the scanning process played a significant and valuable role in the success of the digitisation project.

Streamlined Management of Complex HR Documents

For many organisations, Managing HR documents today is increasingly complex. Standard documents range from onboarding and contracts information to right-to-work, training and disciplinary records. Compliance adds a significant layer of complexity, and varying document retention periods can be difficult to track and manage.

Centralised, searchable records generate a wide range of benefits, including the ability to track, update and retrieve records.

For example, Sytner Group can carry out gap analyses to ensure that no documents are missing, which breeds confidence in the HR team when faced with internal QA or external audits.

Crystal Clear Document Classification

One of the best ways to illustrate Sytner Group's new-found control over documents is the sophisticated yet simple way the HR team can manage a vast range of document categories, each with a different purpose, and potentially with varying retention periods.

Consider Maternity, Paternity, Sickness, Driving Licence checks, Disciplinary, Grievance, Exit Interview, Redundancy letters, Resignation acceptance, Leaver form, Job Description, Offer Letter, References, Pay plan, Payroll documentation, Interview Notes and Right to Work in the UK as a representative selection of the documents Sytner Group can now manage at a granular level.