



## CASE STUDY

# CDK GLOBAL TRANSFORMS CREDIT-TO-CASH PROCESSES WITH DIGITAL TECHNOLOGY

Automotive retail technology company automates collections and disputes

With inefficient processes and a lack of visibility, CDK Global found it difficult to manage collections and disputes effectively.



### Challenges

- Inefficient credit and collections processes
- Lack of visibility into customer disputes
- Inability to enforce a collections strategy
- Time-consuming and non-standard customer communications



### Solution

- User friendly customer billing dispute resolution workflow
- Standard email templates for customer communications
- Data and communications centralized in one location
- Portfolio scorecard for tracking performance of A/R collection associates



### Results

- 60% reduction in open customer billing disputes on average
- An efficient, streamlined workflow for customer billing dispute management
- Improved portfolio coverage ratio due to effective collections strategy enforcement
- Greater insight into collections activities and customer billing disputes

**“We chose FIS because their solution offers the breadth and depth of functionality to meet our current and future requirements.”**

Kirti Talwar, senior director,  
Finance Shared Services at CDK Global

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## Triggers for change

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CDK Global and its predecessor, ADP Dealer Services, have been helping automotive dealers build deeper relationships with customers for more than 40 years.

However, CDK Global's collection processes were manual. Communications with dealer clients were time consuming and inefficient, with about 50 A/R collection team members using individual email accounts to send communications to clients. A lack of centralized records also increased the risk that communications could be lost.

In addition, CDK Global used a standalone ticketing system to manage customer billing disputes and send reminders to call customers. The company had no visibility over which of its 64,000 tickets a year were disputes or how quickly customer billing disputes were being resolved. What's more, A/R collection associates were using spreadsheets to track their activities, which made it difficult to enforce a collections strategy across the organization.

At the same time, CDK Global was setting up a shared services center in India that would manage activities including credit and A/R collections – so it was clear that a new solution was needed to optimize the customer billing dispute resolution process.

## A more effective approach

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After looking into a number of options, CDK Global decided to adopt FIS' GETPAID. Executives cited its straightforward user experience and effective A/R collections management and customer billing dispute tracking capabilities. Another deciding factor was the ability to use both standard and customizable reports.

Since going live, CDK Global has been able to use GETPAID to enforce an A/R collections strategy, streamline communications with customers and gain greater insights into A/R collections activities.

GETPAID also enabled CDK Global's A/R collections team to continue working remotely during the COVID-19 pandemic, which would have been unimaginable if an A/R collection solution was not adopted. Additionally, CDK Global has implemented a user friendly dispute resolution workflow and reduced dispute resolution cycle times.



### A better collections portfolio coverage ratio

CDK Global uses GETPAID to enforce its A/R collections strategy. The A/R collection team can view who they need to call based on the chosen strategy. This has improved CDK Global's portfolio coverage ratio.



### Reduction in open disputes

With more effective dispute tracking and access to both standard and customizable reports, the CDK Global's A/R collection team has reduced average open customer billing disputes by 60%.



### Standardized and centralized communication

Communications between A/R collection associates and customers have been standardized with access to over 60 standard email templates.

In addition, incoming and outgoing customer communications are centralized in one place using GETPAID's integrated Exchange Web Services (EWS) email capabilities.

**“Working with FIS’ Professional Services team was very helpful. Their experience simplified the implementation process and they had great recommendations for process improvements.”**

Kirti Talwar, senior director,  
Finance Shared Services at CDK Global

## A clear ROI

Since implementing GETPAID, CDK Global has adopted a standardized customer billing dispute resolution workflow and gained greater insight into its A/R collection activities, driving

improvements to A/R collection metrics. In addition, customer communications have been standardized and centralized, saving time and reducing the risk of data loss.

### Before

High number of customer billing disputes



Nonstandard communication with customers via email



Decentralized communication records



Difficult to track responsibility for different portfolios



### After

60% average reduction in open disputes

Communication standardized through 60+ email templates

Communications records centralized in one location

Scorecard view tracks performance of A/R collection associates to drive accountability

**RESULT: CDK Global has driven significant improvements in A/R collection metrics and gained more insight into A/R collections and customer billing dispute management.**

**“With FIS, we reduced average open customer billing disputes by 60%, creating a significant improvement in our customers’ experience, which is a huge focus for us.”**

Kirti Talwar, senior director,  
Finance Shared Services at CDK Global

## About FIS

FIS is a leading provider of technology solutions for merchants, banks and capital markets firms globally. Our more than 55,000 people are dedicated to advancing the way the world pays, banks and invests by applying our scale, deep expertise and data-driven insights. We help our clients use technology in innovative ways to solve business-critical challenges and deliver superior experiences for their customers. Headquartered in Jacksonville, Florida, FIS is a Fortune 500® company and is a member of Standard & Poor’s 500® Index.



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