

## SüdLeasing: Orchestrating intelligent document processing with Camunda



### Key Benefits

- Processing 200 documents per week with AI + IDP orchestrated by Camunda
- 80-90% document handling in these workflows now completely automated
- Drastic increase in document accuracy, employee efficiency, and employee satisfaction.

### Camunda Product

Camunda Platform

**Learn why SüdLeasing chose Camunda to orchestrate intelligent document intake and processing (IDP) in their customer onboarding and loan servicing workflows to improve speed and customer experiences.**

### Intro

Commercial leasing requires a large amount of documentation and paperwork no matter which firm you work with, but when you're one of the largest manufacturer-independent leasing companies in Germany, the volume of documents to process to power critical business functions quickly becomes overwhelming. That's why SüdLeasing chose Camunda to orchestrate intelligent document intake and processing (IDP) in their customer onboarding and loan servicing workflows.

### The Problem/The Challenge

Historically, customers had to scan, upload, and email any needed documents, including leasing contracts or invoices, and send them via email attachments to the firm. Employees then had to inspect every single email to ensure that all of the scanned document pages were accounted for and that all the necessary information was included in that documentation. This work was highly time-intensive, as scanning errors frequently meant that pages were mixed-up or compiled out of order, or pages were cut off and missing valuable information.

"There was so much manual detangling needed to get these documents in order," explained Martin Busley, Senior Developer at SüdLeasing. "It was a real mess for our employees."

And the manual intervention didn't stop once the documents were finally put back together. Employees still had to manually classify each document with pre-determined labels and upload them into SüdLeasing's document management system (DMS). Overall, the process was laborious and time-consuming, and still at high-risk for errors. On a larger scale, this system kept different business units out of alignment – information was siloed, and the company was potentially missing out on the benefits that come from scalable, transparent business processes.

That's when Busley and his team knew they needed to find a better way to intake and process these documents – and incorporate them into their business processes for better employee efficiency and accuracy.

### The Solution

While the SüdLeasing team began to iteratively automate parts of their leasing business in 2019, they turned their focus on processes that support SüdLeasing's small-business customers in 2024.

The goal was to automate as much of the contract and invoice intake processes for these customers as possible to maximize the value of employee time spent on these contracts, reserving more human intervention for more complex or high-value business units.

SüdLeasing decided to work with BuildSimple to intelligently inspect these documents and extract the information needed, but they still needed a core orchestrator to integrate that information into the business processes that relied on that data. That's where Camunda comes in.

## Using Camunda to support IDP

SüdLeasing used Camunda's BPMN modeling capabilities to design the document intake process, as well as to strengthen the collaboration between IT and the business users who were previously completing the manual document intake work.

"Business/IT alignment is also very important [to us]," said Tobias Schaefer, BPMN consultant at envite, who works with the SüdLeasing team. "Working from the process model helps get business users working with IT in the right way."

The team depends upon the platform's Optimize process monitoring features to speed up any error identification and incident handling, as well as enabling continuous improvement.

The new process starts by distinguishing between SüdLeasing-originated documents (such as contracts) or customer-originated documents (such as a balance sheet) by using a QR code printed on all SüdLeasing-originated documents. This QR code allows for these documents to be split, sorted, and processed without using an AI solution, which saves the firm time and money. Customer-originated documents are then sent to BuildSimple, the intelligent document processing tool for information extraction and validation. While this document processing happens, basic information is extracted automatically and reconciled against the customer database to know which process to call/send next in the workflow. Any documents that are in XML format are also converted to PDF for convenience. This process now takes a maximum of 2 minutes, where previously it took human users multiples of that duration to manually review, correct, and extract document information.

Camunda also orchestrates several Kafka connectors, which communicate with other systems by signaling that specific customers have sent documents so the correct processes can be triggered. Finally, a human user can make the final decision on which documents are uploaded into SüdLeasing's document management system, closing the loop on the intake process.

## The Results

With Camunda as the core platform orchestrator, and using the BuildSimple AI solution, SüdLeasing gmbH can now process 200 documents a week. Even more amazing, 80-90% of this type of document handling is now completely automated, which enables a drastic increase in document accuracy, employee efficiency, and employee satisfaction.

The team has also noted a strong correlation between the implementation of Camunda-orchestrated IDP and an increase in the number of total contracts processed by the firm, representing a positive impact on the customer servicing journey – and the scale and number of customers that SüdLeasing can now support.

## What's Next?

Within the intelligent document intake process, the next step is to add automation to help move the process along to minimize the human decision-making needed to allocate which documents should be uploaded to the document management system.

On a larger scale, the SüdLeasing team is currently working on replacing their 20+ year old homegrown DMS with Camunda 8. The current system is growing increasingly obsolete and unreliable; beyond that, the team sees this needed upgrade as an opportunity to gain more operational value from the DMS.

"We don't just want to save binary documents, we want to include document processing within the system and transform those processes to C8," Busley said.

For example, by transforming the approval processes that require documentation by using C8, the team could eliminate the need for document context; currently, to trigger these processes, business users have to create "dummy" documents, even if the process doesn't actually require documentation. With C8, there is no need for documentation context. This one change makes the process faster and more efficient, and again helps free up valuable employee time to pursue more influential work for SüdLeasing and their customers.