

*Wullschleger Martinenghi Manzini is a Swiss consulting company that leverages digitization to significantly simplify internal and external collaboration and improve the quality of customer service. The company was awarded the Digital Leaders Award 2024 for its successful use of DocuWare.*



**Noah Beccarelli, IT Manager, WMM Group, Lugano, relies on strong IT solutions for a consistently high quality of service:**

“Robust and reliable solutions like DocuWare go a long way in earning the trust of our customers and ensure a high quality of service at all times.”



Wullschleger Martinenghi Manzini  
Group



- Location:** Switzerland
- Industry:** Service (Management Consulting)
- Deployment:** On-Premises
- Department:** Company-wide use
- Integration:** Abacus, ISAwIn, Quorum, INSA

**Since 1972, the WMM Group, headquartered in Ticino, Switzerland, has been active in the areas of tax and business consulting, asset and real estate management. Thanks to DocuWare, communication between their 80+ employees and more than 2,500 private and corporate customers is now largely digital and seamless.**

DocuWare has been actively used at the consulting firm WMM since 2013. It was launched in the asset management division to digitize the more than 50,000 bank receipts handled annually. Later, the need for digitization also arose in tax and business consulting, as well as in real estate management, which had more complex requirements.

In the past, physical receipts were collected from customers, processed manually, and copies were made for the company's own archives before the originals were returned to the customers. Access to the receipts was unsatisfactory and time-consuming. For example, the consulting firm had to search, copy and send the documents requested by the audit firm individually. At the same time, up to 15,000 copies of receipts per year took up a lot of space and had to be destroyed professionally and for a fee after the retention period had expired. Five years after the first DocuWare implementation,

*"Today, all authorized employees can access the information they need at any time without taking up the time of other departments."*

WMM decided to expand the use of the DMS to the entire company. Thanks to its high flexibility and scalability, their sales partner was able to easily expand the solution and adapt it perfectly to their additional requirements without reinstallation.

### **Data exchange with all IT systems**

Today, about half of their staff works with DocuWare every day. WMM also integrates some of their customers into digital document processing workflows, allowing them to scan their own receipts and submit them electronically to the consulting firm. DocuWare captures the documents and reads the data they contain. The information obtained is later used in two ways. One, for indexing and storing in the document pool. And two, for transferring the data to other IT systems, like the Abacus and ISAwIn accounting software, the Quorum property management system or the INSA portfolio management system. In this way, the DMS not only takes over the entire archiving process, but also prepares the automation of downstream work steps, such as the posting of individual invoices.

The complete integration and process linking enables bidirectional data exchange between the systems. If, for example, an invoice is posted

*"The special thing about DocuWare is its simplicity. A good example of this is the use of digital stamps. They indicate the status of a document and are understandable to anyone without further explanation."*

in accounting, DocuWare updates the status of the archived document and provides it with a digital posting stamp. Digital stamps are also used in all approval processes. At the same time, the documents assigned to a process can be called up from Abacus, ISAwIn, Quorum and INSA in DocuWare at the touch of a button. This means that even employees from outside the department can clearly understand processes later.

**Time savings, high service quality and long-term growth**

The numerous useful DMS functions bring the company many advantages, not only in terms of administrative management. The automatic entry and assignment of documents to workflows leads to tremendous time savings. Clients and auditors can be easily integrated; for example, they can be given read access to a defined document selection or for participation in certain workflows. This greatly simplifies collaboration

both internally and externally. For the WMM Group, the resources freed up on the one hand and the high quality of service on the other offer one thing above all: an ideal environment for long-term growth.

*"Broad DocuWare functionality enables our consulting team to provide our customers with professional service at the highest level."*



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