



Portuguese automotive retail group eliminates paper-based processes and saves 215 FTEs per year



Salvador Caetano

Industry: Manufacturing & Retail

Location: Portugal

Salvador Caetano, one of Portugal's leading automotive retail and manufacturing groups, faced the challenge of managing a predominantly paper-based sales operation across multiple locations and brands. Legal obligations to archive 12 years of sales records, combined with high real-estate costs in Portugal, made the status quo increasingly expensive and unsustainable. Back-office teams struggled with documents and decisions scattered across disparate locations, creating time-consuming tasks, avoidable errors, and delays throughout the sales cycle.

Salvador Caetano partnered with intelligent automation specialists, Roboyo, to drive a comprehensive digital transformation, with Bizagi acting as the central orchestrator across seven business areas. A single platform for all stakeholders with standardized processes ensured consistency and quality across every location and brand in Portugal. The transformation delivered significant results driven by process standardization, enhanced mobility, and real-time adaptability. The sales process is now tracked end-to-end for full visibility to pinpoint bottlenecks. The physical archives were converted to digital documents, so critical information is now retrievable in seconds, strengthening compliance for audits and internal reviews and enabling remote working across multiple sites. The digitization has freed up the commercial administration back-office team, saving the work of 215 FTEs, many of whom were placed into other functions, helping the business to remain competitive. As regulations and market conditions shift, processes can be adapted in real time to ensure the business remains compliant and agile.

"This transformation was about more than cost. It was a game-changing shift in efficiency and competitiveness."

Sara Simões Carneiro,
Project Manager

9

tonnes less paper per year

520,000

automatic transactions per year

215

FTEs saved per year

€5

maintenance cost per sale

Objectives

- Standardize the sales process across all locations and brands in Portugal
- Eliminate paper-based document management
- Centralize decision-making workflows and document access for back-office teams
- Integrate internal tools, including DMS, digital signature, and automatic invoicing, into a single platform
- Ensure full traceability of the end-to-end sales process to identify and resolve bottlenecks
- Enhance employee mobility and enable remote working through location-independent access

Achievements

- 520,000 automated sales transactions per year
- 215 FTE per year saved with staff redeployed to higher-value roles
- 9 tonnes less paper used per year through digitization: near total paper elimination
- Bizagi acts as orchestrator for IT tools involved in process
- Overhead costs of Bizagi and other implemented tools just 5€ per sale
- Full traceability of each sales case from start to finish, enabling bottleneck identification and corrective action
- Real-time document retrieval replaces time-consuming manual search across physical archives
- Remote and flexible working for all back-office teams and access for external auditors
- Real-time regulatory updates pushed instantly across entire organization

Overview

Salvador Caetano is one of Portugal's leading automotive retail and manufacturing groups, with over €4.8 billion annual turnover, thanks largely to vehicle sales, which carry significant documentation, compliance, and financial obligations. Recognising that its predominantly paper-based operations were creating inefficiencies, compliance risks, and barriers to growth, Caetano partnered with Bizagi implementation partner Roboyo to drive a comprehensive digital transformation. Bizagi was deployed as the central orchestrator across seven business areas, replacing physical archives and fragmented workflows with a single, unified platform for all stakeholders.

Challenge

The sales process was primarily paper-based: every transaction generated physical documentation that had to be collected, organized, and stored. This was both for internal purposes and to satisfy Portugal's legal requirement to archive 12 years of sales records. The inefficiencies of managing sales on paper, combined with high real-estate costs meant physical storage of documents was no longer viable.

Commercial International Administrators, who support sellers and operational staff across all Caetano locations, spent significant time organizing paper documents, chasing approvals, and managing information spread across multiple sites. Decision-making was slow because access to relevant records depended on physical presence.

Compliance presented a growing challenge. Each location operated with its own approach to the sales process, so the documents varied between offices in Porto, Lisbon, and the Algarve. When government audits arrived, including financial audits from Portugal's Ministry of Finance or external auditors such as PWC, these inconsistencies could create gaps that were difficult to resolve months after a sale. Sometimes, Caetano would need to chase clients to fill in gaps, which could take up to six months.

The increasing weight of regulatory requirements added further pressure. Portuguese law requires buyers of vehicles over €75,000 to provide extensive documentation to demonstrate the legitimate source of funds as part of anti-money-laundering checks. Managing these requirements manually, across multiple locations and brands, left significant room for inconsistency and error.

The Covid-19 pandemic further exacerbated the limitations of a paper-based model, as back-office staff who needed access to physical archives could not work from home. The group's multi-site footprint meant that teams in different cities had no reliable way to share information or cover for absent colleagues.

Solution

Working with Roboyo, Caetano implemented Bizagi as the central orchestrator of its sales process. The project took a business-first approach from the outset: Roboyo's team invested significant time understanding the operational realities of each business unit. This helped to create visible,

traceable processes to replace the manual, paper-based work.

Bizagi was integrated with Caetano's Document Management System (DMS), digital signature tools, and automatic invoicing, orchestrating sales, finance, and operations into a single point of reference for the first time.

Standardized workflows were established, with a mandatory document checklist embedded directly into the sales process. Any new regulatory requirement can now be reflected instantly and uniformly across every location and brand. There is no longer a risk of one site operating differently from another.

Results

Efficiency and cost savings

The most visible outcomes of the transformation is the savings in manual effort. The digitization saved Caetano 215 FTEs per year. The staff freed from administrative tasks were not displaced; they were redeployed into higher-responsibility, higher-value roles within the business.

The maintenance cost per sale is just €5 per sale for Bizagi and all other internal tools (IT costs divided by annual sales), demonstrating the financial value of digitization, compared to the high cost of Portuguese Real Estate needed to store the physical files. Additionally, nearly eliminating paper use and saving 9 tonnes of paper per year has removed the burden and expense of physical archiving, while also contributing to ESG targets by making the business more sustainable.

Compliance and audit readiness

Document retrieval is a significant benefit of the digitization project. Previously, when an auditor arrived, Caetano would need to dedicate one or two employees to accompany them through physical archives, searching by licence plate number or process reference through boxes held in basements and attics. It was time-consuming work that generated no real business value, although a legal necessity. Now, auditors are given their own digital user access through an online portal and can retrieve documents themselves. Both parties are more productive as a result, and it helps Caetano to meet the government's deadlines. The scale of the improvement was illustrated by a recent financial audit requiring access to 2000 sales processes.

"Five years ago, [an audit] would have been months of retrieval work. Now, we can assemble a team and in a week or two, we can have this information sent out to the auditors. It's game changing."

Sara Simões Carneiro,
Project Manager

Flexibility and culture

Back-office teams now work from paper-free desks with real-time visibility of outstanding tasks. They can see exactly what information is missing and from whom, and they can work from any location, enabling genuine remote working and seamless cover across sites.

The flexibility of the Bizagi platform has been central to the group's ability to keep pace with a rapidly evolving regulatory environment and changing automotive retail market. As new requirements emerge, processes can be updated in real time and pushed across the whole organization immediately. A culture of ongoing improvement has taken root, with the platform continuing to prove its value as the business grows.

"It opened up the way I see things regarding software implementation and how it can help. Professionally, it was a very successful project, and it still is, a business change method of work for us that continues to prove itself."

Sara Simões Carneiro,
Project Manager