



Case Study Facts:

CLIENT: Taylor Consulting and Contracting

DIGITECH SYSTEMS RESELLER: eSoftware Solutions

PROBLEM: Scanning and indexing processes were inconsistent and inefficient

SOLUTION: PaperVision® Capture and PaperVision Enterprise

RECOGNIZED BENEFIT: Accelerated bill processing and dramatically improved customer service

Taylor Consulting and Contracting Increases Efficiency by 75% with PaperVision® Capture

Business is booming for a utility management company called Taylor Consulting and Contracting (Taylor). As the cost of natural resources increases, owners of apartment buildings, retail locations and big businesses hire Taylor to monitor their day-to-day energy consumption and help them control their utility costs. To do this, Taylor must process and track hundreds of utility bills for more than 18,000 utility meters across the Northeast. With trays of incoming mail to handle, managers at Taylor knew they could better serve their current customers and build more efficient processes for future company growth.

Since implementing a Digitech Systems Enterprise Content Management (ECM) system, Taylor has streamlined utility bill processing, increased information accuracy and greatly enhanced customer service.

The Situation

Taylor (www.utilitymodule.com) is a national utility management firm with extensive experience in deregulated energy sales and regulated utility consulting. Through sales of proprietary energy deliverables such as UtilityModule and EnergyAuctions, Taylor has become the fastest growing energy services organization on the East Coast. They are headquartered in Avoca, PA, but also have satellite offices in Boston and Philadelphia.

Taylor receives as many as 100,000 customer utility bills each year, and before implementing an ECM system, managing all the incoming mail was a challenge. This steady stream of critical business information created accuracy, consistency and customer service concerns. A team of four people scanned the incoming documents, but heavy loads created backlogs of scanning and indexing duties on a weekly basis. Every day, employees manually indexed the scanned invoices and entered information by hand into Taylor's utility bill tracking database. The manual data entry was time consuming and labor intensive.

Sharing information with energy suppliers was also frustrating. In order to bid on energy auctions for aggregated Taylor customers, suppliers needed three months of past utility bills for each customer. In response, employees struggled to email thousands of invoices at once and were hindered by oversized email attachments and incorrect email addresses. "We kept seeing the same problems over and over again," said Nancy Close, IT Director. "We knew we could improve our processes and provide better service to our customers and suppliers."

Taylor hired Jack Walsh, a business consultant and President of Globe Digital Business Services, to help them analyze their processes and find the right solution. "Taylor needed to standardize invoice processing, minimize manual data entry and provide clients direct access to Taylor documents," said Walsh. "As their consultant, I was challenged to identify a sophisticated technology that would both integrate with the company's utility tracking database and offer flexible and customizable options."

Key Benefits

- Enhanced utility bill processing efficiency by 75%
- Reduced customer service calls by 95%
- Provided clients with secure online access to utility bills
- Avoided hiring three new employees, saving \$78,000 in personnel costs each year
- Eliminated scanning and indexing backlogs



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The Solution

Walsh was familiar with Digitech Systems product suite, but he wasn't sure if it could do everything Taylor needed. "After talking to people at Digitech Systems, it was apparent that this was the perfect choice. It was the right technology at the right price, and I was impressed with the company and the corporate values," said Walsh. Close also liked the solution, because it was scalable and could easily expand with company growth. In August 2009 eSoftware Solutions, a Digitech Systems reseller, installed PaperVision Capture for invoice imaging and indexing as well as PaperVision Enterprise for information management and retrieval. Additionally, Taylor's system engineers, Software Engineering Associates, and Digitech Systems Professional Services customized the ECM system for their unique needs.

Recognized Benefits

Taylor immediately saw processing efficiencies. PaperVision Capture recognizes which indexing process to use with each invoice and helps employees map the appropriate data to the correct index field. As a result, Taylor standardizes indexing procedures and increases accuracy.

In order to link incoming utility bills to the correct client account and utility meter, employees previously had to research Taylor's utility tracking database. But now the ECM system finds the information and guides employees

"Our employees no longer have to hunt and search for the right index field information, because PaperVision Capture brings it up right away. This increases our efficiency and improves record accuracy."

-Nancy Close, IT Director

through the correct indexing process. Here's how it works. Match and merge technology queries the Taylor database and displays the account's corresponding utility meters. Since indexing requirements vary based on the specific utility meter, accuracy is critical. Before, indexers hand entered the meter ID number, but now they simply choose the number from a results list. Next, PaperVision Capture recognizes which indexing process to use for that particular meter and presents the appropriate index fields. By increasing control and by streamlining these important steps, processing times are 75% more efficient and backlogs were eliminated.

Other features enhance accuracy by reconciling invoice amounts and verifying all information is correct before it is automatically exported to Taylor's utility tracking database. These productivity gains have enabled Taylor to reduce processing staff from four people to just two and reallocate resources. Even with recent customer growth, Taylor is processing more invoices with the same number of employees and avoiding \$78,000 in additional personnel costs each year.

Integration between Taylor's utility tracking database and PaperVision Enterprise is also a benefit. The system is so easy to use that Close didn't have to spend excessive time training employees. As many as 20 staff members can be working in the database and access customers' energy usage history and previous utility bills. Customers and energy suppliers are accessing all their information too, so employees no longer struggle to email invoices. Clients just log into the database and securely retrieve stored documents. As a result, customer service calls decreased by 95%! Instead of three calls per day, Taylor receives closer to three calls each month. "Our customers are very pleased," said Close.

Customers are happy, and so is Taylor. "PaperVision Enterprise is very reliable. Often when we do this level of integration and customization, something is always breaking. But we don't have problems," said Close. "The software works, so it isn't a distraction. It's great."

About eSoftware Solutions

eSoftware Solutions has helped over 1,000 businesses worldwide to streamline and manage their information and document flow. Through their industry leading software applications and innovative web development, their clients are able to realize returns on their investments in as little as eight to 10 months. To learn more about eSoftware Solutions, visit their website at www.mysoftware.com or call 877.267.2737.