

CLEARResult[®]

CLEARResult Success Story



THE PAINLESS WAY TO A PAPERLESS OFFICE

Summary

Industry

- Energy/Utilities

Challenge

- Better way to manage paper influx
- Improve process efficiency
- Improve customer service

Solution

- Outsource mailroom operations to Digiscribe New England
- Create a fully digitized, paperless review process

Impact

- Eliminated 12 file cabinets in the office and warehouse storage
- More efficient processing
- Enhanced customer service

Solutions Used



Mailroom Services



Document Scanning & Indexing



Integration Services

Executive Summary

CLEAResult conducts home energy assessments (HEA) for over 40,000 residents in Massachusetts and was experiencing significant growth. Though CLEAResult uses proprietary software to model each home, each visit also generates up to 30 documents including diagrams, contracts, receipts, material disclosure forms, and handwritten notes.

With over 35,000 documents being generated weekly, CLEAResult turned to Digiscribe New England to find a better way to handle this increasing influx of paper. With Digiscribe New England's document scanning services and document management expertise, CLEAResult has achieved the following:

- **Faster "Time-to-Serve":** work performed as the result of a HEA can take place 2-3 business days faster (which also accelerates CLEAResult's cash flow)
- **Doing More with Less:** handles volume increases of 10% - 20% per year without increasing staff
- **Enhanced Customer Service:** CLEAResult customer service reps can answer questions on the same call instead of hours later
- **Off-site Storage Savings:** 40,000 documents per month no longer need to be stored off-site

"I would definitely recommend Digiscribe New England. I really appreciate the accessibility to the [Digiscribe New England] team. I can't think of a time where I didn't get a response in a day, if not immediately. It's great to work with them."

Brian Kissane
Regional Operations Manager

Challenge

As the most trusted leader in residential energy efficiency, CLEAResult was experiencing significant growth and needed a better way to manage the influx of paper from their home energy audits and maintain the high level of customer service they were known for.

Packets with over 30 documents for each of the 40,000 annual HEAs were either mailed in or dropped off at headquarters in Westborough, MA. CLEAResult's internal staff would break down the packets into folders which were then reviewed, checked against a work schedule, and routed manually through each of CLEAResult's workflow stations. Many times, physical file folders would get lost causing the workflow to come to a standstill until they were found. Once completed and approved, files would be assigned to a team who scanned the paper documents and then emailed them to contractors for review and implementation of work.

HEA kept in-process and completed files from the previous 6 months on-site, documents from the 6 months prior in a nearby warehouse and older files off-site in a document storage facility for at least 7 years after completion of work. Often, customers weren't ready to move forward right away, so job specs conducted in February may lead to work being done in October. In that case, the folder was stored off-site so it first had to be located and returned from the storage facility, which could take days, and only then could CLEAResult get back to the customer.

"This was not sustainable and became completely unmanageable as we grew," says Brian Kissane, CLEAResult's regional operations director. "The existing process was demanding too much manpower and time, slowing down work and resulting in challenges in regards to customer service."

Solution

CLEAResult's EVP of IS wanted to find a better way to manage their documents and workflow, so he turned to Digiscribe New England, who had a local presence and offered document scanning expertise and mailroom services – all within CLEAResult's budget.

With the Digiscribe New England's solution in place, CLEAResult Energy Specialists now mail their document packets daily to Digiscribe New England's Norwood, MA scanning facility. The mail is opened and documents are prepped, scanned, and indexed by site, project, customer, and one of 25 different document types. The digitized documents are uploaded within 48 hours to an Amazon S3 site as searchable PDF files and kickoff an automated workflow in CLEAResult's proprietary software for review and processing by CLEAResult's staff. As an additional service, Digiscribe removes live checks from document packets stamping them for "deposit only" and send the checks via Federal Express to CLEAResult's lock box.

Contractors are now automatically alerted from within CLEAResult's software when documents are available for their review. They can also access CLEAResult's system to update or upload any forms needed to complete a project.

Impact

Faster Time-to-Serve

- HEA files are received from field auditors faster as they are mailed daily to Digiscribe New England
- Mail is opened and documents are prepped, scanned, and uploaded to CLEAResult's workflow automation software faster, within 24-48 hours
- Digitized documents are processed faster by CLEAResult's staff; in 3-5 business days instead of 5 to 7
- Communication with contractors is automated and faster
- Proposals to clients are delivered faster

Increased Efficiency

- Increased demand met without increased staff
- Workflow expedited as documents are no longer lost or misplaced
- Contractors have access to audit and proposal documents directly on CLEAResult's enterprise management software
- Document repository provides single location for storage of and access to auditor, contractor, and customer documents
- Less clerical work allows more value-added and analytical positions for staff and exposes top performers to other areas in business, helping to develop the team

Impact

Enhanced Customer Service

- Proposal turnaround time significantly shortened, from 5 to 7 days to 3 to 5 days
- Customer inquiries answered on the phone in seconds, not hours
- Field workers have access to customer files from a mobile device
- Email documents to customer immediately upon request

Space and Off-Site Storage Savings

- Eliminated 12 file cabinets in office
- Eliminated warehouse storage of documents
- Over time, will eliminate need for records storage facility

About Digiscribe & Digiscribe New England

Digiscribe delivers paperless office solutions that eliminate manual and inefficient business processes in accounts payable, human resources, and other critical business areas. Our clients engage us to lower costs, improve efficiency, and mitigate compliance risk throughout their organizations. We offer cost-effective services and software including outsourced digital mailrooms, mailroom scanning, workflow automation, cloud document management software, and document scanning. Digiscribe's New York office is one of the first SOC 2 Type 2 document conversion centers in the tri-state area, and our New England office is a Massachusetts Privacy Law compliant facility. Both offer award winning technical support and customer service, more than 30 years of experience, and a HIPAA compliance trained staff. Learn more at digiscribe.info.

About CLEAResult

CLEAResult is the largest provider of energy efficiency programs and services in North America. Through proven strategies tailored to clients' unique needs and market dynamics, the combined strength of experienced energy experts and technology-enabled service offerings help CLEAResult change the way people use energy for hundreds of utility and business partners. Founded in 2003, CLEAResult is headquartered in Austin, Texas, and has close to 3,000 employees in more than 70 cities across the U.S. and Canada. CLEAResult is a portfolio company of General Atlantic, a leading global growth equity firm. For more information, visit clearesult.com.



THE PAINLESS WAY TO A PAPERLESS OFFICE

digiscribe.info

New York
800.686.7577

New England
877.550.2088

info@digiscribe.info