

CASE STUDY

ENERGY EFFICIENCY PROVIDER

Our client works with the Nova Scotia government delivering energy efficiency programs .

OVERVIEW

Complex government reporting requirements

Our client is required to collect hundreds of data points in the field while servicing many clients. This data must be included in monthly reporting back to the government in particular formats. The manual process to report and invoice puts immense pressure on high-value finance resources due to time sensitivity. Inevitably, this leads to lost productivity, stress, and mistakes.

CHALLENGE

1 REMOTE COLLECTION

Collecting and submitting large volumes of data back to the office and database

2 CUSTOMER APPROVAL

Capture customer signatures, acknowledging completed work in the field

3 REPORTING

Eliminate manual processing of required government reports

SOLUTION

- Sandbox configured front end with specific workflow used on tablets by field staff, saved into one database
- Signatures are captured on those tablets using touchscreen
- Drag & drop upload of 3rd party data collected into the same database, preventing manual entry and human error
- Exception reporting created to catch errors as they are captured

RESULT

- Backlog of over 5000 leads processed, capacity increased
- Exceeded targets for 3 straight months for the first time in Government program history
- Exceptions are near 0 by month-end for invoicing, which takes a few clicks now without manual effort