

# Automating workflows to take back market share



In the power industry, competitive advantage is determined by response time; so Electricity Ashburton's slow manual contract management processes were costing them customers and time. They needed an automated solution that would speed up response times, improve customer service, and help them take back market share...

## Customer Overview

Electricity Ashburton (EAL) supplies power to Ashburton customers between Rakaia and Rangitata rivers. Its 74 employees look after more than 16,800 line connections and 2,776 km worth of network lines. And with an average of 40 new connections each month, both connections and load are growing.

To support its customers, EAL functions through two main divisions: Contracting and Network. Customers wanting a line connection quote speak to the Contracting division; which manages all connection-related tasks within the customer's property. Meanwhile, the Network division organises anything that relates to the network lines outside the customer's property; assigning jobs based on information that Contracting provides.

## The Challenge

In 2006 Electricity Ashburton administered all its contract management (including quotation and job management) processes manually. Employees took notes of customer conversations using pen and paper, information could be stored in any of several locations, and when it came to scheduling (and rescheduling) subcontractor jobs, the team used the only tools they had to hand: erasable pens and a write-on white board.

This not only created volumes of extra work that stretched out the quotation process (six week delays from contact to quotation were not unusual); it also allowed critical tasks (or entire connection requests) to potentially "slip between the cracks". And the lack of controls around information management led to regular communication hiccups; with annoyed customers having to repeat information to different staff members, or incomplete job details being passed between different divisions. "The result", says EAL's IT Manager, Kyle Stewart, "was lost business, as new competitors we'd never had to deal with before started luring away our customers with promises of faster quotes and better service".

## The Solution

EAL realised they needed to take decisive action, and Stewart recalls researching several solutions until he had shortlisted three. He chose Olympic because of their focus on, "how their product and PRINCE2 project management together could combine to make a difference to our company."

Olympic proposed a "Contract Work Flow" (CWF) solution that would automate EAL's entire contract-related process: speeding up service and bringing contract information together in one place. It would also let employees attach documents or add notes to individual contracts, offer an 'electronic whiteboard' that let them reschedule jobs at the touch of a button, and keep customers and subcontractors informed by automatically e-mailing them at key points in the process.

To create the CWF solution, Olympic began with a SQL Server database foundation, then built on this with a combination of i-builder applications: i-builder workflow for the process workflows, i-builder portal for the web interface, and i-builder connect for the notifications.

## Implementation

After carrying out a Solution Planning Study (SPS) to ensure they understood exactly what Electricity Ashburton needed, Olympic divided the implementation project into four distinct logical phases. This division would not only help Electricity Ashburton retain tight control over their investment during the project; but would allow them to realise benefits as early on as possible.

"The SPS required high levels of internal co-operation," Stewart adds. "The real heroes of the exercise were the Contracting division, who put aside the required time; and Olympic's Andy Farrar, who translated a relatively undisciplined set of business processes into a comprehensible document that formed the basis of the CWF."

## The Results

As at the time of writing, Phases 1 & 2 (the quotation and contract management workflows) have been completed, and EAL is quality testing Phase 3 (the notifications and the electronic whiteboard). Even in these early days, the decision to phase the implementation is proving well justified. Minor change requests are considered a simple fact of project management life; yet the thoroughness of the initial SPS has meant that only three requests have been raised, which has made the project run more smoothly and sped up delivery times.

And already, Electricity Ashburton are well on the road to realising a return on their investment. "The CWF has directly improved our cashflow," Stewart states, "with billing now happening on time, every time. Because billing is now an integral part of the workflow, we have no more late or missing invoices."

On top of this, EAL now turns customer quotations around in a third of the time they used to take, and subcontractor work can be rescheduled almost instantaneously. Customer service levels and inter-divisional communications have also both improved, as employees have everything related to a contract available in one place for both current and historical jobs – which means lost market share is already being regained.

## Highlights

- Electricity Ashburton's slow manual contract management processes were losing the company market share and creating scope for missed deadlines or process steps.
- Olympic designed and developed a workflow automation solution that would streamline and speed up processes, and improve productivity.
- Using a combination of i-builder products, Olympic created a browser-based system with a SQL Server database that automated both the existing workflows and notifications of any at-risk deadlines.
- The overall project was divided into four phases for better cost management, and to realise specific benefits as early as possible.
- Although only in Phase 3, benefits have already included reducing the quotation process time by two thirds, making subcontractor job rescheduling instantaneous, and improving both productivity and inter-divisional communication.

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