Operational Efficiency and Smart Forms

How Utility Providers Can Improve Operational Efficiency Through the Integration of Smart Forms

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Utility providers generally lag behind other industries when it comes to the adoption and integration of new technology, but operational efficiency is becoming increasingly important to customer satisfaction.

HERE'S HOW SMART FORMS CAN HELP

CONTENTS

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INTRODUCTION

Consumer expectations in today's market are higher than ever and that means the day-to-day operations of your utility has to be absolutely seamless; specially if you are going to deliver superior customer experience (CX) that makes your customers feel valued.

Whether operating in the water, sewerage, electricity, gas or the telecom industry, utility providers are often risk averse and married to manual processes. This has resulted in a lack of spending on new technologies, which otherwise would improve both back-end processes and customer-facing experiences. The result? Poor customer satisfaction levels and a poor CX for the vast majority of utility providers.

To satisfy utility customers, it's now important to reduce customer effort, offer self-service platforms, enhance the user experience through technology and deliver exceptional customer service that removes all customer pain points.

In a world of customer-centric businesses, this is simply the only way to have a good relationship with your customers and deliver the customer experience they are expecting.

While focusing on customer-facing technologies is essential to this, improving your operational efficiencies with innovative and automated technologies is the real winner – but how exactly can you improve utility operational efficiency?

DEFINING OPERATIONAL EFFICIENCY

Before we get into how your utility can improve its operational efficiency, let's first dive into the meaning of operational efficiency and why it's so important that you focus on this aspect of your business.

In its simplest form, operational efficiency is streamlining day-to-day processes to improve business performance.

It involves making the most of new, innovative technologies to automate manual processes and prioritize operational effectiveness. Additionally, it is the process of delivering high quality products and/or services at a more productive and efficient rate.

This is particularly important today, as improving business processes is now essential to a great customer experience.

Through the integration of technology that allows for the sharing of information across departments and eliminating those mundane manual processes, your utility will be able to improve organizational communication and enhance business processes.
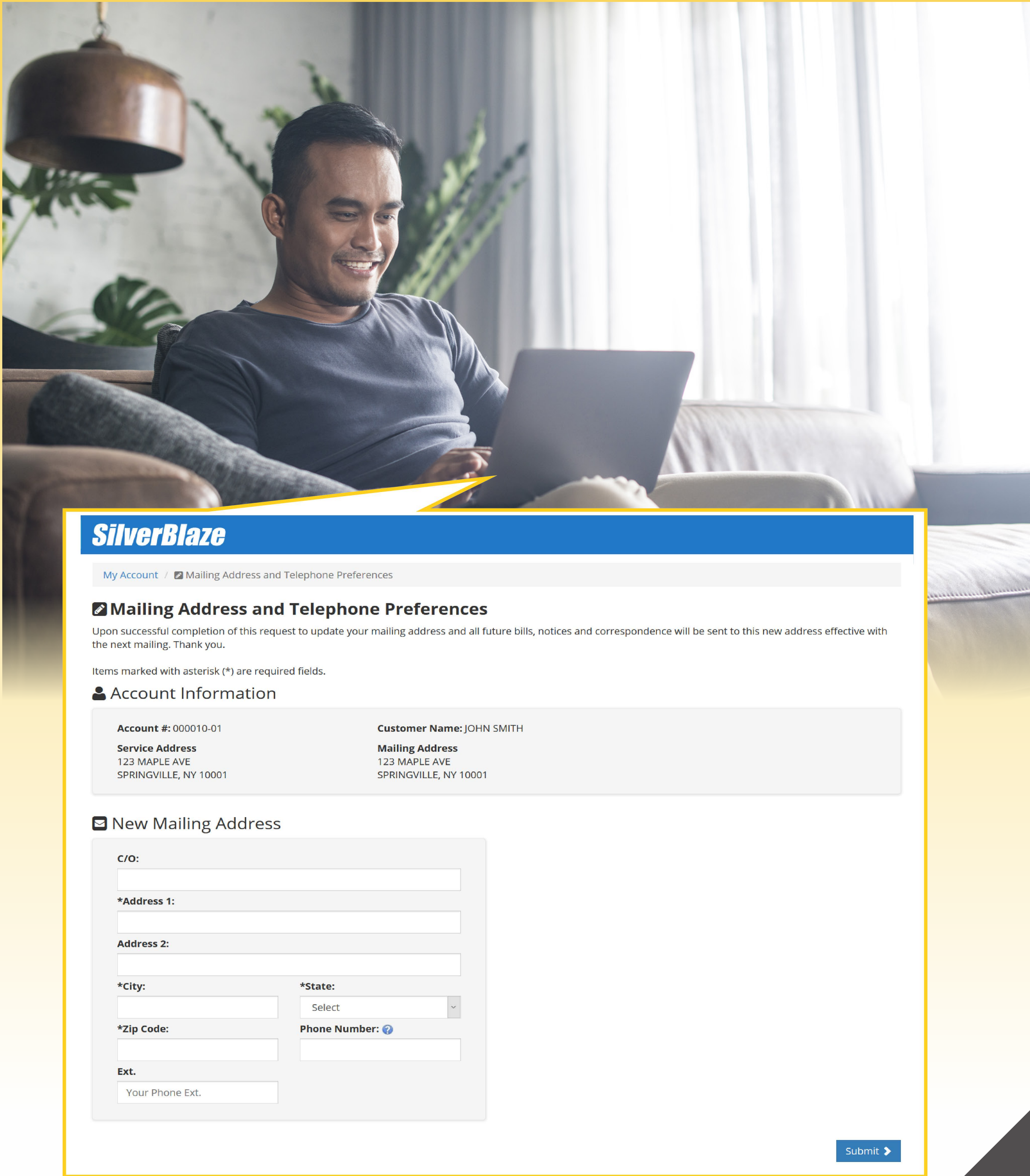
CONT'D

Self-service platforms are a prime example of operational efficiency. By streamlining communication with customers, a utility will free up customer service resources to work on more complex or time-sensitive tasks. The end result is a seamless experience that reduces friction and customer complaints.

Implementing new technology into your utility isn't just about fancy consumer facing tools. A digital transformation of your back-end technology can help your business **share information and make informed decisions** to realize significant benefits, such as efficiency, cost savings and issue resolution.

When considering a self service strategy, a key component is customer facing forms. Or more specifically Smart Forms, which can be designed and tailored for utility providers and their unique business requirements.

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My Account / Mailing Address and Telephone Preferences

Mailing Address and Telephone Preferences

Upon successful completion of this request to update your mailing address and all future bills, notices and correspondence will be sent to this new address effective with the next mailing. Thank you.

Items marked with asterisk (*) are required fields.

Account Information

Account #: 000010-01	Customer Name: JOHN SMITH
Service Address 123 MAPLE AVE SPRINGVILLE, NY 10001	Mailing Address 123 MAPLE AVE SPRINGVILLE, NY 10001

New Mailing Address

C/O:

*Address 1:

Address 2:

*City: *State:
Select

*Zip Code: Phone Number:

Ext.
Your Phone Ext.

Submit

SMART FORMS

Smart Forms are a way of automating and going far beyond the capabilities of your utility's paper and simple web forms. They are interactive - adjusting the user experience based upon the customer's input, your business rules and enterprise data. A user's experience with the forms, such as the sections displayed, fields captured, validations, wording and other components can vary based upon a multitude of factors.

This ensures your customers can send and receive the information they need quickly, accurately and conveniently - with just a few clicks of a button.

Smart Forms allow utilities to transition away from time-consuming, inefficient manual processes. Instead, utilities can focus their efforts where they are truly required. Smart Forms boost customer satisfaction and lower utility operating costs by creating efficiencies for both parties.

Once submitted, Smart Forms are processed internally using a powerful integrated workflow platform. The forms can be processed automatically or routed to the correct department based upon the request details along with your utility's operational standards.

Smart Forms push information seamlessly into a utility billing system and all other corporate software applications, eliminating redundant tasks and the potential for human error.

It's an easy way for your customers to connect with your utility, and it's an easy way for your utility to automate and improve your entire back-end customer service and the customer experience on your portal.

IMPLEMENTING SMART FORMS INTO YOUR DAILY OPERATIONS

Smart Forms provide an incredible benefit for customer service, ensuring forms are completed accurately and entirely, while adhering to your utilities processing best practices.

An example of a Smart Form in action is the **Application for Service form**, which enables a customer to sign-up for a new residential, commercial or industrial account.

This multi-page form captures a new customer's service address, application details, banking, contact and other information. It is typically available **anonymously** from your public site.

APPLICATION FOR SERVICE FORM

Key Features and Benefits

CUSTOMER

☑ **Versatile Applications**

Commercial, residential, and industrial apps

☑ **Service Address Table Integration**

Ensuring customers only select valid service addresses, avoiding keying issues

☑ **CIS Integration**

Allows the form to present only the available service for the selected address (for multi service utilities)

Allows the form to switch to a commercial or residential form

☑ **Secure ID Verification**

Ability to securely upload a picture to verify personal identification

☑ **Utility-specific Validations**

Validations against the future move-in date and a customer's date of birth

Validations for completeness, such as ensuring a customer enters their landlord information when necessary

UTILITY

☑ **Smart Form Triage**

Ability to prioritize a specific form to a specific group (if your commercial accounts are managed by a specific group)

☑ **Optional Approval Process**

Based on the utilities requirements, a form may be first viewed by Customer Service, then routed to Billing for completion

☑ **Expediting Form Details to CIS**

Avoids expensive and error-prone keying efforts
Can be performed automatically or manually

☑ **Automated PDF Transfer**

Ability to automatically send a PDF version of the form and attachments to your document management system for long term storage

TRANSFER OF SERVICE FORM

Many of the Smart Forms are available for existing customers through a **secure online self service portal**. Which means the customer has been provided with credentials and is known to the utility. The **Transfer of Service** form is a perfect example:

- Many fields, such as a customer's service address and contact information can be **pre-populated**. This improves both accuracy and customer satisfaction.

- **Validations** can leverage the information gathered from the CIS and they can also be made against the outstanding balances and account status.

- Forms can be **automatically processed** by your CIS without manual approval or any other intervention.

My Account / ⇄ Transfer of Service

⇄ Transfer of Service
Items marked with asterisk (*) are required fields.

👤 Account Information

Account #: 000010-01   **Customer Name:** Dan Mair

Service Address   **Mailing Address**
123 MAPLE AVE,   123 MAPLE AVE
SPRINGVILLE, NY 10001   SPRINGVILLE, NY 10001

*Last date of service at current address:

Click here to select date   📅

*Are you moving into an existing property, or a new property?

🏠 Existing Property   🏠 New Property

*Date to turn on service at new address:

Click here to select date   📅

*What is your new mailing address?

✉ Use New Service Address   ✉ Use Current Mailing Address   ✉ New Mailing Address

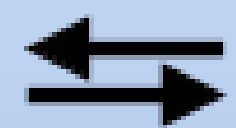**Where can we reach you with further questions?**

Contact Telephone #:

SMART FORMS THAT CAN BE USED BY YOUR UTILITY

Pre-authorized Payments

By allowing utility customers to quickly and conveniently sign up for automatic pre-authorized payments, your utility can eliminate late payments and improve its revenue cycle.
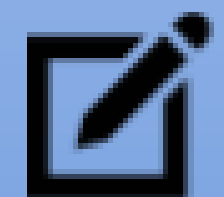
Transfer of Service

This allows an existing customer to move from one location to another within your utility's territory.

Move-out Request

If a customer is moving and needs their service disconnected, this form allows them to easily inform your utility of their needs.

Account Changes

Customers can conveniently change their name, mailing address, or people linked to their account through Smart Form™ contact with your utility.
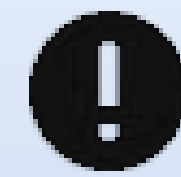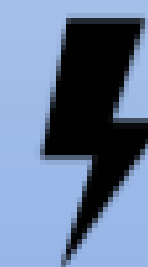
Billing Issue

This particular form accepts a customer's questions regarding their bill. Your utility can investigate before responding to the customer, saving both the utility's and the customer's time.

Donations and Pledges

Customers can enroll in your donation program(s) that will be beneficial to your community.

Streetlight Outage

What if a customer finds an issue with your service, for instance, a street light is out near their home? No need to worry, consumers can quickly submit a notification straight to their respective utility provider.

HOW SMART FORMS CAN ASSIST UTILITY'S ENGINEERING AND OPERATIONS DEPARTMENTS

While Smart Forms have significant benefits that improve your utility's customer experience and internal processes, Smart Forms can also enhance your utility's engineering and operations teams more.

Engineering and operations are integral teams within your utility. It is essential that they have the latest tools and **technology to offer streamlined and enjoyable customer experiences**. These departments will realize significant operational and communication efficiencies after implementing Smart Form and workflow tools, no matter the size of the utility.

CONT'D

From an internal processing perspective, key features of the **Service Request Smart Form** include:

Work Triage:
This tool allows managers to maximize their resources by easily distributing service requests to the appropriate departments in real-time, based on your utility's requirements.

Efficient Resource Allocation:
By ensuring that all the required service conditions have been satisfied, Smart Forms will make sure your resources are deployed to a site only when necessary (truck roll).

Completion Metrics:
Department managers can easily track their required completion metrics, ensuring the utility meets its service targets and avoids any potential issues. By giving your engineering department the tools needed to succeed, you can make them more efficient by **reducing operation efforts** through automation, **eliminating redundant tasks** that waste the time of your resources, implementing **configurable internal processes**, and much more.

When your engineering department works more efficiently, your utility will be able to fulfill customer service requests faster and more attentively: as a result, your customers will be more satisfied.

EVALUATE YOUR OPERATIONAL EFFICIENCY

Are you ready to take your utility to the next level and implement new, innovative technology that will revolutionize your internal processes?

The innovative SilverBlaze Customer Portal™ for Utilities allows for the seamless integration of SilverBlaze Smart Forms™ and workflow software that will carry your utility into the future.
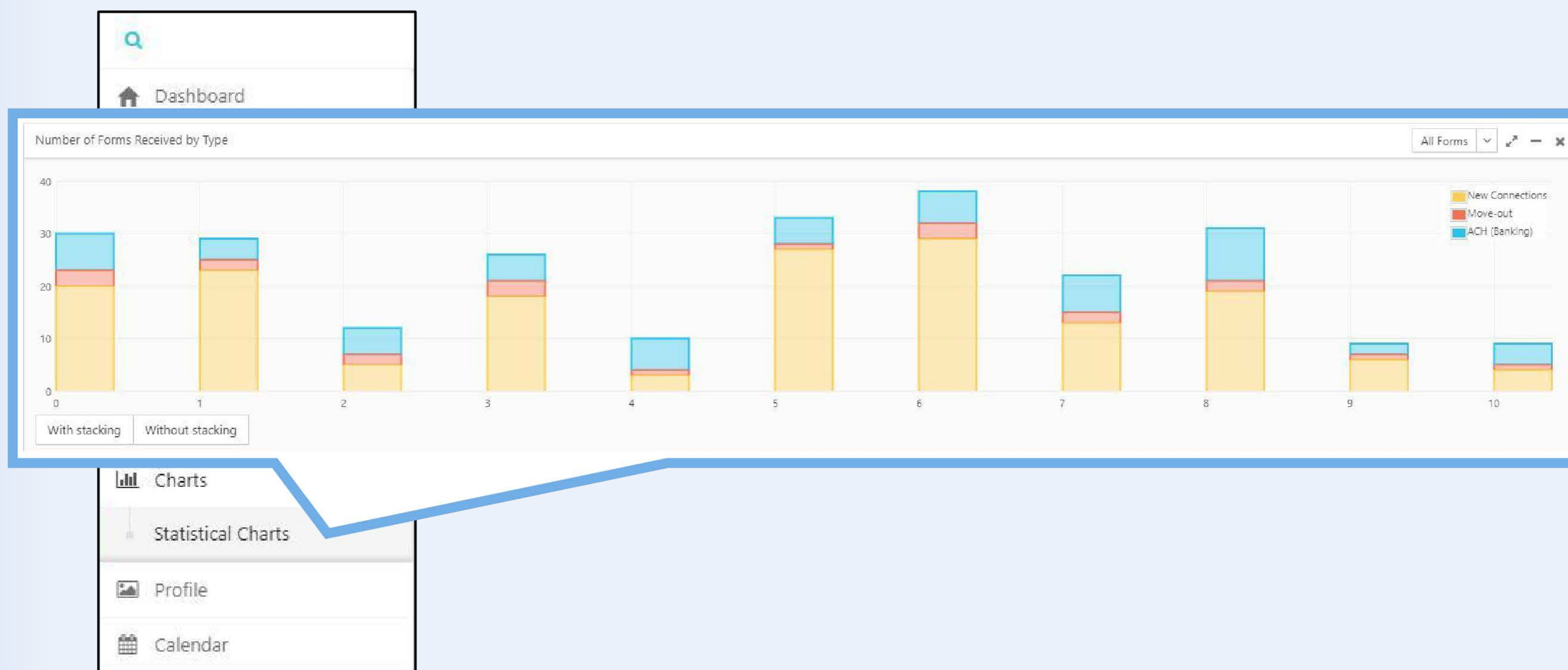
Want to learn how it works? Simply contact one of our experts for a demo today and experience firsthand how our Smart Forms and Workflow Software can automate your internal processes and significantly improve your operational efficiency.

PREPARE FOR THE FUTURE!

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A Division of **HARRIS**

**Contact us to learn more, or
to schedule a live demo of the SilverBlaze
Customer Portal with Smart Forms**

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