

CASE STUDY

Large Energy Company Powers Game-Changing Improvements in Customer Service.

A large energy company harnesses Kofax RPA™ to automatically process incoming customer requests—such as moving between providers or changing address. Now, 75% of requests are completed without human invention, saving time for call-center staff and helping them respond to customers within minutes rather than days.

75%
OF FORMS PROCESSED
AUTOMATICALLY

1 hour
TURNAROUND FOR
CUSTOMER QUERIES

Creates
RELIABLE PROCESS METRICS

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ABOUT THE COMPANY

This large energy company delivers electricity and other energy services to businesses and homes across North America.

PRODUCTS IN USE

Kofax RPA™

FOCUS

Robotic Process Automation

Customer Onboarding

CHALLENGE

The energy industry has undergone massive change in recent years. Monopolies have been broken down and new market entrants have hit the scene, offering alternative energy sources such as solar and wind power. As a result, consumers are enjoying greater choice than ever in who provides their power.

To retain their strong market position, incumbent providers are under pressure to improve service quality. After putting its business under the microscope, one large energy company identified areas for improvement in its handling of customer requests.

A spokesperson for the large energy company explained: “We respond to around 1.5 million customer requests every year, and the vast majority of them relate to a small handful of topics. For example, it might be a new customer looking to sign up for our services, a customer who wants to transfer their service as they move homes, or a customer terminating their contract because they are moving outside of our territory. The majority of customers submit these requests using straightforward web forms.

“In the past, the requests were processed by call-center agents, who opened up the web forms and updated our legacy billing systems. The process was manual, and given the massive volume of requests, workloads soon piled up—making it a challenge for agents to fulfill each and every request in a timely manner. We set out to find a more efficient way to respond to these routine enquiries.”

“In just three business days, Kofax built a functioning prototype robot that worked with our legacy systems—an impressive turnaround.”

Spokesperson, large energy company

SOLUTION

The large energy company decided to automate the processes for answering straightforward customer enquiries using the Kofax RPA™ Robotic Process Automation (RPA) platform.

“We have acquired several smaller energy providers in the last few years, and because we have not yet consolidated, we currently operate a range of legacy billing systems,” explained the spokesperson. “We needed RPA vendors to demonstrate that their robots would be able to work with all of our legacy billing applications.

“Some vendors connected to our systems remotely, whereas Kofax chose to visit us in person, showing that they were keen to understand our business and the challenges we were trying to solve. In just three business days, Kofax built a functioning prototype robot that worked with our legacy systems—an impressive turnaround.

“We decided to partner with Kofax because they were willing to license the RPA solution based on throughput rather than number of robots. That approach allowed us to build a large number of very simple robots that would be easier to train and maintain. Because our robots are very simple, we can build them very quickly without having to stand up a test environment—cutting the build time by between 60 and 70%. Also, unlike most other vendors, Kofax showed that its solution could interact with PDF forms, which we plan to adopt in future.”

RESULTS

Today, the large energy company uses the Kofax RPA robots to process routine customer enquiries around-the-clock, seven days a week.

“Previously, we responded to customer enquiries within three business days on average,” recalled the spokesperson. “Around 60% of customers completing a given web form called us, either because they didn’t have confirmation that their request was being processed or because they had a question or problem.”

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“As a result, we were handling a high volume of duplicate requests, and teams ended up working on the same request in parallel, which further hampered efficiency.

“Now, robots often complete requests and respond to customers within the hour, reducing employee workloads and driving a better customer experience. What’s more, customers now receive responses even if they submit their enquiries outside call-center opening times, as the Kofax RPA robots work continuously.

“We process 75% of web forms without human intervention. Kofax RPA has been very well received by our call-center agents, because the solution has substantially lightened their workloads and reduced the need to work overtime. What’s more, our employees are happier because they can focus on more productive tasks. Automation is also helping us reduce our dependency on contractors and temporary staff, and curb the growth in new hires.”

The company seized the opportunity presented by Kofax RPA to not just automate processes, but improve them. The spokesperson remarks: “The onboarding process is the beginning of a new customer relationship, so it’s crucial that we make a great first impression. With that in mind, we have transformed our previous transactional approach to shape a better customer experience.

“First off, we let customers know right away whether they need to pay a deposit or provide any additional information for us to set up their account and start their service, rather than coming back to them three days later. Also, we automatically register customers for our online services and send them a welcome pack. What’s more, we work out whether customers are eligible for our free offers such as LED light bulbs, and let them know right away.”

Similarly, the company has fine-tuned its process to provide additional support for customers who are moving outside of its territory and need to terminate their contracts. For example, the company can offer the customer a reference, helping them avoid having to pay a deposit to their new provider. By providing better care for customers after their contracts come to an end, the company hopes to strengthen its reputation. Similarly, Kofax robots manage the transition for customers moving home within the company’s territory, informing them if they become eligible for promotions such as air-conditioning rebates.

In addition, the company has improved its support for customers who are struggling to meet their payments and may be legally entitled to an extension. Previously, if customers called before their bill was due to ask for extra time in advance, their requests did not fall within the regulations’ scope, and the company was unable to help them. With Kofax RPA, the company has created a robot that adds customers’ account numbers to a nurturing campaign and checks when their account is moved to disconnect status, when the legal entitlement kicks in. At this point, the robot emails the customer to let them know that they are now eligible for alternative payment arrangements and gives them a range of options—reducing anxiety for customers and helping them keep up on their payments.

RPA has given this large energy company thorough, reliable metrics about its processes, helping teams understand why some transactions succeed and others fail, and how customers react to certain treatment. The company uses these insights to fine-tune the customer experience. For example, it found that many customers mistype their account number, so it has introduced rules-based formatting to its web forms to improve data quality and avoid problems downstream.

The company is now applying RPA to improve other parts of its business. For example, the company has developed a series of Kofax RPA robots to create day-end, month-end and year-end finance reports, and verify that all relevant documents are in financial management systems. Another robot checks that the company’s servers are running well, performing some tasks not managed by standard monitoring solutions. Meanwhile, other robots assist in onboarding new employees and contractors to streamline the process.

The spokesperson concluded: “Kofax RPA has been a game-changer for our business, enabling us to deliver better customer service than ever before and providing a huge competitive advantage to help us grow market share.”

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