

Drawloop Saves Energy Provider \$100,000 in Customer Service Costs by Automating Document Process

Challenge

Plymouth Rock Energy had a problem most companies would love—significant customer growth. Unfortunately, their internal systems – including an archaic Access database – just could not keep up with the demand. They found themselves manually generating thousands of invoices a month, which were prone to errors because of the sheer volume. Further, operational teams were generating and sending complex business contracts with few controls on approved language and outside their scope of responsibilities

Solution

In 2011, Plymouth set out to completely overhaul their internal systems. They engaged a third party consultant who recommended Salesforce for their CRM system, FinancialForce for their billing system, and Conga as their document automation system. While the first two proved to be perfect fits, Conga fell short in its ability to support the level of automation and their volume requirements. After a LinkedIn recommendation, Plymouth evaluated Drawloop's LOOP Document Services app and quickly realized it could not only handle their volume requirements but also help automate their commercial and industrial contracts—which required over a dozen customized terms as well as a dynamic price-quoting engine.

Results

Plymouth Rock Energy has experienced significant productivity, efficiency and financial savings as a result of deploying Drawloop LOOP Document Services across their organization:

- Automated the monthly generation of more than 50,000 customer invoices including customizing how they are sent or received, i.e. box.com, email, print and mail, ftp, etc
- Used Excel as middleware between LOOP Document Services and Salesforce to generate price quotes and then automatically send as a PDF attached to email to customers
- Saved approximately \$100,000 in costs associated with customer service and billing errors
- Eliminated the need to hire two to three additional headcounts on the operations teams

Plymouth Rock Energy Replaces Competitor with Drawloop for Their Ability to Support Large Volume & Complex Requirements

Plymouth Rock Energy is one of the leading independent energy providers to residential and commercial and industrial customers. Because of the vast industry information available about deregulation, consumers have become more savvy around cost-savings from independent providers, and as a result, Plymouth has realized significant growth. The challenge was that they were quickly outgrowing their own internal systems. A simple Access database just could not keep up with the volume increase. For example, their billing team had to individually run tens of thousands of invoices each month. It was not only time-consuming, but also prone to errors.

In 2011, Plymouth set out to find a new customer relationship and billing system. Upon recommendation of a third party consultant, Blue Wolf, Plymouth chose Salesforce.com and FinancialForce.com. Simultaneously, they also realized they needed to automate their document process and again went with Blue Wolf's recommendation, Conga.

"We basically had checked the 'Conga' box as our document automation vendor," said Jonathan Adlerstein, CIO for Plymouth Rock Energy. "However, as we got closer to implementation and started talking to them about our requirements, we quickly realized Conga could not support our complex needs and volume requirements and would still require manual intervention."

Needing to find an alternative document automation solution, Jonathan posted a question to his LinkedIn



Industry:

Energy

DDP Use Cases:

Invoices, Commercial contracts, Price quotes (using Excel as middleware), Account statements, Proposals, Savings analysis, Usage report

Company Overview:

Plymouth Rock Energy is a leading independently owned and operated energy provider offering natural gas, electricity, oil and sustainable solutions throughout many deregulated markets. With sixty-plus years of experience, Plymouth helps manage the energy needs of many homes, multifamily residences, small businesses and commercial & industrial properties offering competitive pricing along with personalized service. Plymouth Rock Energy continues to expand to reach new markets throughout the U.S., garnering a positive reputation for exceptional prices, timely delivery and exceptional customer service.

"We could not have automated such a complex and customized contract process without Drawloop. We expect to save over \$100,000 annually in just customer service issues and billing errors alone."

Jonathan Adlerstein,
CIO for Plymouth Rock Energy

network. Drawloop came highly recommended. Drawloop's LOOP Document Services could easily handle their monthly volume of invoices and other documents, had far more automation options, and also had the ability to integrate with Excel and use it as middleware to compute and automate their complex pricing scenarios. Plymouth quickly "unchecked" the Conga box and replaced it with Drawloop.

Drawloop Automates 50k+ Invoices Monthly & Creates a Pricing Engine

After deploying Salesforce, FinancialForce and LOOP Document Services, the first document that Plymouth automated was their monthly customer invoice. While not an overly complex document, there was a hefty volume generated – 50,000 each month. With LOOP Document Services, the billing department now runs all 50,000 invoices en masse as a background scheduled process with no manual intervention. In addition, once the PDF invoice is created, LOOP Document Services automatically decides based on the Salesforce data and the bill type how to send the invoice to the customer—electronically, print & mail, cloud storage, etc.

"Drawloop provides so much versatility," said Jonathan. "Our billing team finally has a completely automated system, and yet they also have complete control over the document and how it is delivered to the customer."

With Drawloop, Plymouth was also able to automate some documents and processes that Salesforce and FinancialForce otherwise could not. One in particular is a customer's account statement, which pulls data from multiple sources and provides a running total of a customer's debits and credits. This is a completely custom report ,but with Drawloop they were able to automate the process so that data was automatically pulled into a report and produced as PDF, Excel or Word depending on user preferences.

Plymouth has also automated many other documents including proposals, savings analysis and usage reports, but their most complex project by far was automating contracts for their commercial customers.

Contracts for commercial and industrial customers are highly customized. Almost every term is negotiable and specific to the customer including business type, commodity, utility type, pricing, payment and billing terms, state where located, time period, and fixed or indexed products just to name a few. One change to a term and the entire contract was altered. In addition, most business customers are brought to Plymouth by a third party broker, who is paid on commission and included in the contract process as well. So technically, Plymouth had to negotiate with two parties and capture all terms in a single contract. Finally, the industry must comply with regulations at several levels and these often dictate requirements on contracts.



The new contracting process with LOOP Document Services is completely automated and includes a portal in Salesforce, accessible to internal partners and external brokers as well as a proprietary quoting engine. Now when a broker wants a quote, he enters the information and personalized customer terms into the online portal, which creates a CPQ (configured price quote).

Drawloop pulls data from Salesforce records and reports, runs it through Excel as middleware where the quote data is automatically transformed, then pulls all the approved terms and language from Word documents stored in Salesforce and produces the complex, dynamic contract. LOOP Document Services then receives the pricing quote, generates an email containing the contract and sends it immediately to the broker. Because pricing changes daily, Plymouth also uses LOOP Document Services and the mass loop functionality to automatically generate a summary report of the multiple deals quoted for each broker.

"Using Drawloop LOOP Document Services for our contract process has been transformational," said Jonathan. "We expect to save over \$100,000 annually in just customer service issues and billing errors alone. We could not have automated such a complex and customized contract process without Drawloop."

"We also expect Drawloop to save us two to three additional headcounts on the pricing team, as they are no longer responsible for producing the contract. Now our pricing team can do what they were hired to do – evaluate pricing quotes."



What is a DDP™?

A Dynamic Document Package (DDP) is the tangible output of LOOP Document Services and the end deliverable sent to anyone at anytime. A DDP is a single packaged asset comprised of one or more different document types - Word, Excel, PowerPoint or PDF - that are dynamically merged with Salesforce data. The set of documents are the same native ones currently used during the sales or service process, except now they reside in Salesforce.

About Drawloop

Drawloop fundamentally changes the way documents are created during the sales and service process by allowing you to dynamically merge any Salesforce data into any combination of document templates (Word, Excel, PPT, PDF, etc), via a Dynamic Document Package (DDP). By creating and managing all of your sales and service documents in Salesforce, you eliminate manual processes, increase accuracy and compliance, while still leveraging existing business logic and workflow rules.



For more information

Call: (877) 462-5667

Email: sales@drawloop.com

WWW.DRAWLOOP.COM