

● WHITEPAPER

From supplier to service provider

The digital transformation of utilities with ECM



- Discover the added value of digitalization for utilities providers
- What successful digitalization looks like: case studies
- How to improve customer loyalty with digital services

Utilities providers are in a transformational phase: They are becoming service providers for the public – and they are under increasing competitive pressure. To meet this challenge, utilities providers have to strengthen customer loyalty, develop new business, and reduce costs in their core business.

This white paper looks at real-world examples of how utilities providers are digitizing and automating case-specific business processes and recurring workflows, in addition to rolling out new customer services. You will learn why these solutions accelerate processes, improve service quality, and provide transparent documented business processes, thereby providing important competitive advantages.

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The utilities sector is changing

From supplier to service provider

Today, utilities providers have to be much more than suppliers of water, electricity, gas, and the requisite infrastructure. They are increasingly becoming a service provider for the public, to whom they provide services – from managing the change of electricity provider to information on tariffs and contracts, to advice on energy efficiency and smart home systems. Excellent customer service is the USP that distinguishes utility companies from “discount providers”: Fast, personalized information, as well as transparent digital services 24/7, clearly beat the endless waiting loops in the call center. This is only possible if employees have immediate access to the latest information and can process cases without delay. Utilities providers deliver this by digitizing their documents and processes. This creates the conditions for better customer loyalty and greater competitiveness.

Digitalization as a competitive advantage

Information is an important asset for utilities providers today: In customer communication, it provides accurate information on contracts and tariffs. For new connections and service interruptions, it is indispensable for quickly handling all processes and ensuring that products such as electricity, gas or water are delivered efficiently. When staff has to search long for the right information, it can lead to long lead times and costly errors. Customers and business partners no longer want to wait. To prevent them from moving to competitors, the topic of digitizing business-critical processes has moved high up on the agenda for utilities providers.

Enterprise content management (ECM) solutions, such as document management and automated workflows, make it easier for people to manage cases and workflows. However, utilities providers are currently facing the question of how best to implement their requirements. They are looking for a solution that digitally maps their business processes and thus helps to increase their efficiency and quality.

The following case studies show why ECM solutions are suitable for this purpose and what competitive advantages can be achieved.

The digitalization of internal and customer-centric processes, supported by SER, is an important component of the overall digitalization strategy of our public utilities company.

Horst Schröder, Head of Shared Services



What utilities providers achieve with ECM



Strengthen customer loyalty

By providing direct information, individual support and digital services, they ensure customers are satisfied and do not want to switch to competitors.



Higher revenue

They create consistent, quality-assured processes, make better use of resources, and thus handle more customer inquiries in less time.



Minimized compliance risks

They document business processes and documents in a complete and clear manner, thus avoiding compliance violations and penalties.

How utilities suppliers can digitize services and core processes with ECM

Case studies: Work more productively



Automated inbound mail & invoices at Westfalen AG

All processes start in the mailroom. Instead of distributing documents manually and then processing them on paper, Westfalen AG uses automated workflows. Inbound mail is scanned instantly, filed correctly and forwarded to the relevant workers to process, enabling staff to respond more quickly to inquiries from customers and suppliers.

We currently process about 66,000 documents per year and are very pleased to have Doxis, because it allows us to do our work much faster.

Brigitte Rybarz, Manager of Accounts Payable,
Westfalen AG

And since the company digitized this process with Doxis ECM, no more invoices have been lost: They are all digitized directly and processed automatically. As a result, processing times in accounting have been shortened considerably, and Westfalen AG can meet discount periods more easily. The processing of meter reading cards is also automated: The ECM reads the meter readings reported for gas consumption from the meter reading cards and sends them to SAP for further processing. The tedious and error-prone manual processing of cards and invoices is no longer necessary. This saves Westfalen AG time and reduces costs, which it can use to further improve its services and products.



Document management & electronic files at Stadtwerke Bielefeld

Documents for construction projects, permits, acceptance tests: When new connections are set up, a large number of documents are generated and these have to be processed and reviewed. Utilities providers that want to keep track of their documents rely on digital document management. Stadtwerke Bielefeld does the same: It processes all construction project activities electronically. All documents relating to new connections and maintenance orders are available in digital form and are bundled in electronic construction files, in which, for example, fitters immediately receive an overview of a construction project. When documents are edited, all previous and current versions are transparent – no one has to search inefficiently or work with outdated information, and no document is lost.

The electronic construction file enables a quick, comprehensive view of the status of the construction work and helps decisively in accelerating process workflows.

Jörg Borgstädt, IT,
Stadtwerke Bielefeld

Especially when working with external architects and installers, it should be possible to share, edit and align documents as quickly and as transparently, as between as employees within a company do so that customers are supplied with electricity, water, and heat without delay. Stadtwerke Bielefeld has developed a grid connection portal for this purpose together with other grid companies: Grid construction and connection processes are handled safely with all parties involved using the integrated Felix software. The resulting documents and SAP data are archived by the Doxis ECM in the proper business context in an audit-proof manner. As a result, construction projects can be aligned more quickly, which shortens the project time and reduces costs.

[READ THE FULL CASE STUDY](#)



Digital contract management at Raffinerie Heide

Creating contracts for customers quickly and providing them information at any time is a critical advantage in service. Raffinerie Heide manages contracts of customers – as well as business and finance partners – with digital contract management. In addition to all contracts, the contract-relevant data and documents relating to the respective customer are bundled in electronic files and can be found immediately in case of questions. The company manages the contract review process with workflows in Dosis. It can help, for example, to find the right auditor and to initiate the right approval processes, based on multiple checks and verifications. This helps to avoid mistakes and to conclude business deals faster. When it is time for contract renewals, Dosis notifies the employees of Raffinerie Heide in advance so that they have adequate time to renegotiate terms and achieve better contractual conditions for their company.

That's what makes digital work so effective: The workflow system now handles the entire process. No step can be omitted.

Ralf Everding, Application Specialist, IT,
Raffinerie Heide

In addition to contract management, Raffinerie Heide also uses numerous other Dosis solutions. Since the platform includes services for ECM and BPM, which can be freely combined according to the modular principle, the refinery also independently configures new applications and workflows, thus quickly designing solutions to meet its requirements.

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Mobile working at Cologne's Municipal Sewage Works (StEB)

During repairs and construction, fitters and engineers also have to have information on-the-go about customers and projects. If you take paper documents with you, other employees will not have access to them during this time, or you will need to make copies that might not correspond to the current version of the document. Cologne's Municipal Sewage Works (StEB) has a better solution for this: With the Dosis ECM, they can provide documents on-the-go. Employees at construction sites can access up-to-date information in construction and project files via a tablet, and sample collectors from the wastewater laboratory have customer files at their fingertips wherever they are. Employees can store new documents or document photos directly on site in Dosis. This makes it easier for employees on site to work, and office managers are able to obtain new information more quickly in order to process cases.

With our Dosis solutions, we have succeeded in breaking down the information silos within the company, setting up interdisciplinary processes across departmental boundaries, and enriching them with the information they need.

Oliver Saus, Deputy Head of IT and Head of IT Document
Management at Cologne's Municipal Sewage Works (StEB)

Today, StEB uses more than 55 ECM applications – from personnel files to construction and project files to digital mail processing. Many of the solutions were created by StEB itself on the basis of the Dosis platform, which is used throughout the company and thus enables standardized processes across areas.

Case studies: Win customers & build long-term loyalty with digital services



Workflows for new customer connections at STEAG Fernwärme

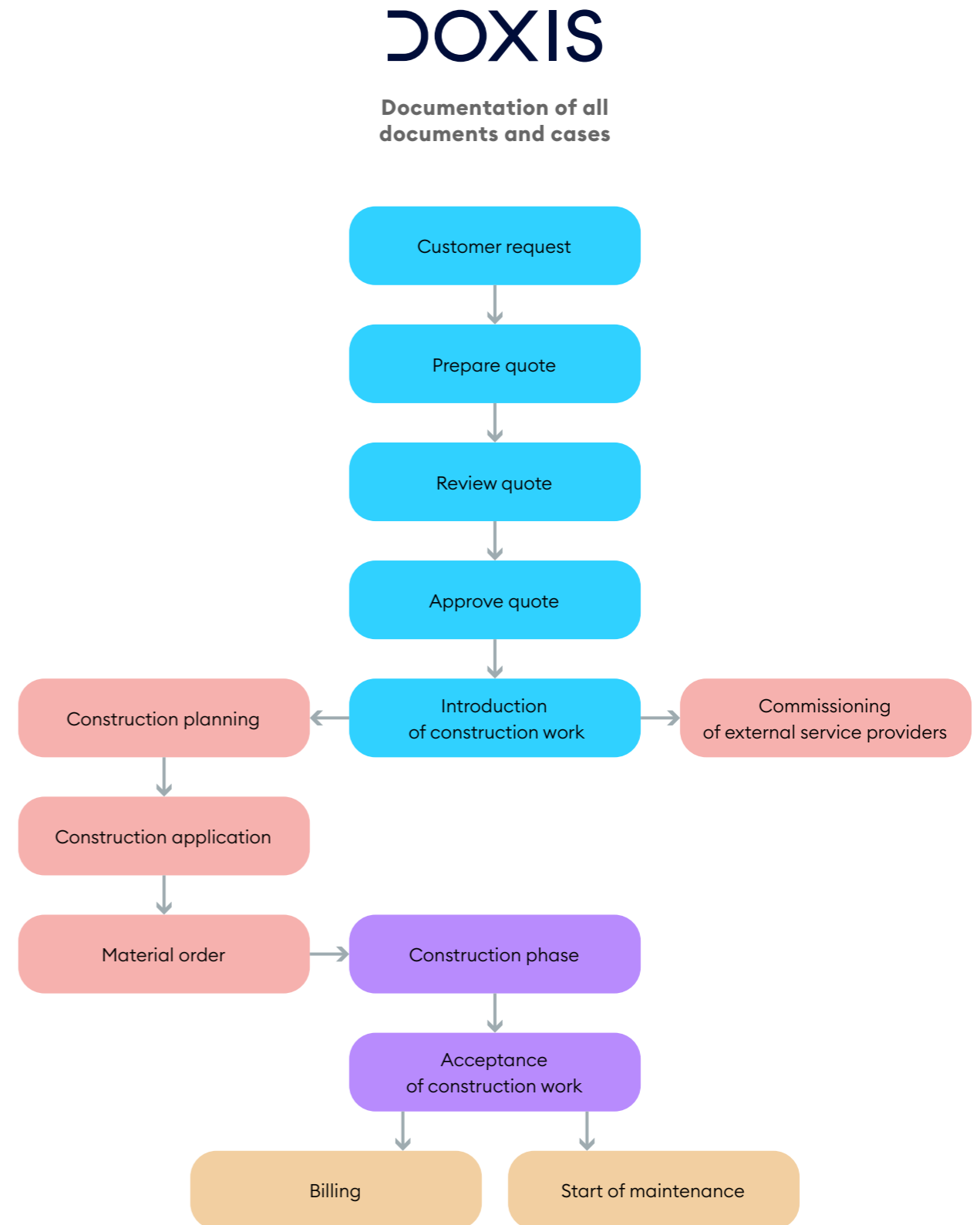
When new customers have to be connected to district heating lines, the employees at STEAG Fernwärme work together: Customer service representatives handle customer requests and prepare quotes, engineers and technicians plan construction measures, and external service providers implement them. It takes all parties working together smoothly to ensure customers quickly get the heat they need. STEAG manages these activities with workflows in Dosis. Processes that always run in the same way, such as quote preparation and approval, have been automated, which saves a lot of time. For construction projects, where additional materials have to be ordered or assessors might have to be involved depending on the situation, technicians can flexibly add tasks and workflows at any time. The ECM documents everything, so that every step can be traced in the event of any subsequent questions about the project.

Dosis is a great system. We can work with it without any problems and our processes are supported very well. What else could we ask for!

Günter Schlegel, System Administrator for Dosis at STEAG Fernwärme

The documents available directly in the workflow are particularly helpful for the project teams. Contracts, customer emails, permits, building plans, acceptance reports, invoices: all of this is found in the context of the relevant process. As a result, the ECM can provide customers with information immediately, e.g. on the status of a new connection and it takes considerably less time than on paper to implement it.

Example of a new customer connection with standard & ad hoc elements





Electronic customer files at Stadtwerke Frankenthal

Stadtwerke Frankenthal manages 30,000 household connections. In order to keep track of all customers and to answer their questions quickly, Stadtwerke Frankenthal uses electronic customer files: consequently, employees can immediately find documents on a house connection, customer contracts, emails, invoices, etc. – and always in the right context. Instead of waiting for circulation folders to arrive at an agent or for colleagues to forward the required paper files, all employees have simultaneous access to information at any time and can process customer requests faster.

The digitalization of internal and customer-centric processes, supported by SER, is an important component of the overall digitization strategy of our public utilities company.

Horst Schröder, Head of Shared Services,
Stadtwerke Frankenthal GmbH

The ECM solution has developed into a customer information system in the public utility's customer service department, which has changed the way employees work and inspired them from the very beginning. Stadtwerke Frankenthal, for example, achieved a high level of acceptance for the newly introduced system in a very short time and improved its customer service.

[READ THE FULL CASE STUDY](#)



Integrated customer portal at Westfalen AG

Today's customers expect smooth and convenient communication. They don't want to make long phone calls and wait for documents to be delivered to them. Westfalen AG has also recognized this. It also uses Doxis in customer services, among many other areas: The ECM is integrated with the customer portal and allows online access, for example, to current safety and product data sheets, order and delivery data. Customers can find all the information they need around the clock.

Our customers can see their order details 24 hours a week, 7 days a week. If our customers have lost documents, they can download them again from the portal as a PDF file. This is an additional service that we can offer our customers with Doxis.

Dennis Decker, Sales Management Manager and Customer Portal Supervisor,
Westfalen AG

If an employee of Westfalen AG updates a document, the new version is automatically available immediately in the portal. This eliminates the need for employees to manually exchange documents and send them to customers via email or mail. They will have more time to address customer questions and focus on the quality of the information provided.

Case studies: Improve compliance & avoid penalties

Transparent documentation at Stadtwerke Schwäbisch Gmünd

Utilities companies operate in a highly regulated market: The Federal Network Agency, E-Control or ElCom standardize business processes such as grid connection, grid construction and repair, meter operation, inspection and maintenance. In order for utilities providers to prove that they meet all these requirements correctly, they need clean, complete documentation of their business processes.

Doxis is our basis for successively digitizing and consistently documenting our business processes.

Thomas Lange, IT coordinator,
Stadtwerke Schwäbisch Gmünd GmbH

Stadtwerke Schwäbisch Gmünd transparently maps regulated processes with their ECM and thus simultaneously document all processes and the related documents without gaps. This not only ensures that all relevant processes are properly documented, but also saves a lot of time and effort.

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Verifiable data protection at Westfalen AG

The EU GDPR places high demands on the protection of customer and employee data. Even before the European regulation came into force, Westfalen AG already ensured with the Doxis ECM system that personal data is stored securely: The HR archive is in a separate client of the ECM archive. Only HR employees have access to documents and SAP data. At the same time, all changes to documents are logged and the documents are archived in an audit-proof manner according to legal retention periods.

All business areas and divisions in Westfalen AG use the functions of the archive system, both nationally and internationally in all companies.

Ingo Köster, Manager of IT Application Management,
Westfalen AG

EU GDPR requires companies to be able to demonstrate the protection and, if requested, deletion of personal data. With the existing ECM, Westfalen AG has the right solution for this.



Secure reporting at Raffinerie Heide

Utilities such as Raffinerie Heide require a high level of financial strength. The company needs a double-digit million investment every year. Raffinerie Heide secures this with the help of strong financial partners. However, the financing contracts are subject to extensive compliance requirements.

Now that employees from outside of the finance department can view contracts and their obligations, there is a lot better understanding of compliance issues.

Rainer Hass, Team Lead Accounting, Raffinerie Heide

With Dosis, the company meets 265 requirements, such as the quarterly report on financing and proof of contract compliance: The obligations workflow reminds the responsible employees promptly of the reports to be created and provides them directly with all the necessary information about the contracts and compliance requirements. In the workflow, they can confirm receipt and completion of the task. The ECM logs all of this and notifies other employees, if steps remain. This ensures that all the evidence is provided on time and that the financing continues to be secured.

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What's next: Navigating the digital future

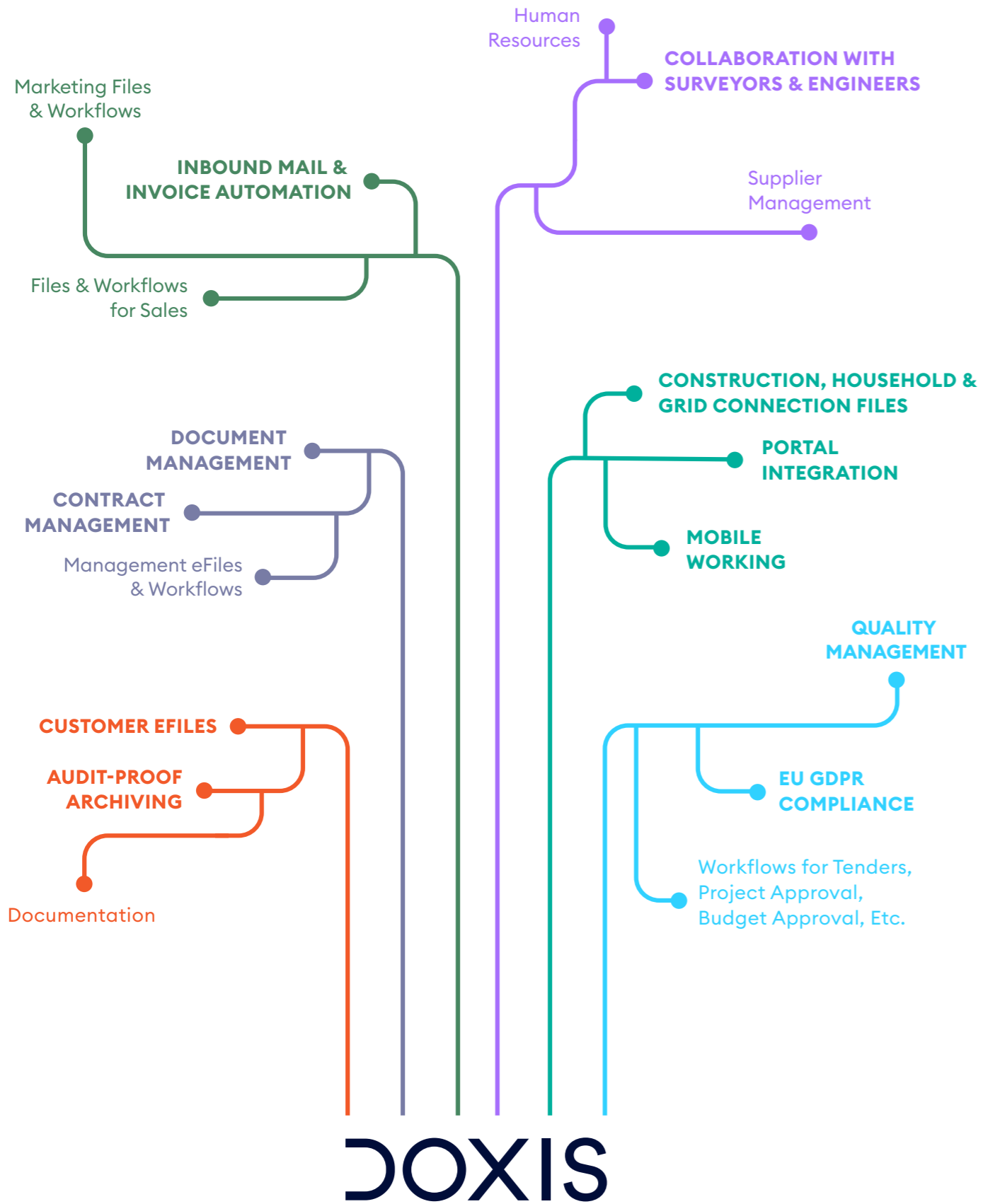
Why utilities providers rely on an ECM platform strategy

Smart services for customers, shorter lead times in the core business, more efficiency in regulated business processes: Utilities providers are faced with the task of solving these challenges in order to remain competitive. The utilities firms presented here, like so many others, use the Dosis ECM platform for this purpose.

These utilities providers have a competitive edge with Dosis



Doxis Solutions for Utilities Providers



Which way now?

For over 35 years, SER has been helping organizations to find ways to transform and optimize their business processes, by enabling on-demand access to relevant content and case files at the point of need.

We would welcome the chance to tell you more about our approach and our latest Doxis software, either in person or via a virtual meeting.

For a detailed needs analysis, tailored to your organization's specific priorities, and a live demonstration of what smarter, next-generation content and business process management looks like and how it could work for you, please contact us at

info@sergroup.com



About SER

SER is a leader and pioneer of the enterprise content management (ECM) and content services market. SER's AI-powered Doxis Intelligent Content Automation platform and its solution suites for business-critical processes automate content understanding across enterprise ecosystems. Acclaimed by market analysts, SER's cutting-edge solutions make daily work easier for more than five million users. With over 35 years of experience, SER's dedicated team works from 22 locations around the globe.

