

Gilmore Leverages Doxim to Win RFP with Leading North American Utility Retailer



EXECUTIVE SUMMARY

CUSTOMER

Gilmore Global provides a full range of print and document supply-chain solutions to large, distributed enterprises in 12 countries, across four continents.

CHALLENGE

When North America's number one competitive electricity and gas retailer wanted to provide its CSRs with simple to use, online access to customer bills and statements, it sent Gilmore an RFP.

SOLUTION

Gilmore turned to Doxim for help with its RFP response. Doxim created a proof of concept that helped Gilmore secure the contract. Gilmore has since sold the solution to multiple other clients.

BENEFIT

Utility CSRs can view PDFs of customer invoices online that are identical to the client's invoice. Customers can also view their invoices online via an SAP portal

THE CUSTOMER

Gilmore Doculink, a subsidiary of Gilmore Global, provides a full range of print and document supply-chain solutions that help large distributed enterprises get their products to markets worldwide. It operates out of 12 countries across four continents, with a head office in Kanata, Ontario.

THE CHALLENGE

Gilmore had received an RFP from North America's largest competitive electricity and gas retailer, (serving over five million customers). The energy retailer wanted to provide its Customer Service Representatives (CSRs) with, simple to use, on-line access to customer bills and statements to better handle customer billing inquiries.

Gilmore already housed a number of document management applications but none were suited to this requirement, which demanded regular batch upload of invoices and statements into an archive for simple on-line search and retrieval – output directly from Gilmore's in-house composition engine.

THE SOLUTION

Gilmore approached Doxim for help with their RFP response. Within one week, Doxim had created a proof of concept and proved to Gilmore, and their client, that the Doxim solution would meet their needs.

"The turnaround on the RFP was very aggressive and Doxim came through with flying colours, They set up the initial POC over just one weekend and convinced us that they were the solution provider to back."

Chris Maia, Director of IT at Gilmore Doculink

The fact that Doxim based its pricing model on document flow, vs. user seats, was also a significant differentiator compared to other solutions that Gilmore's customer considered.

Gilmore won the bid, helped by Doxim, who also developed and delivered two features specified in the RFP. One allows CSRs to request on-demand print and mail of a document to a client, automatically adding a cover sheet if the client had changed address. The other electronically stamps the energy retailer's letterhead (logo, address etc) onto the electronic version of the document, so that the online PDF is identical to the client's document.

Doxim Case Study

The energy retailer originally issued the RFP to find a short-term solution (for about 6 months) until they could develop an in-house solution, but they have been so satisfied with the Doxim application and its capabilities that, four years into the program, the platform is still in place at Gilmore.

"Our customer has been very happy with the Doxim Enterprise Content Management (ECM) platform. It has fully automated their document search and retrieval process and we have not had any issues to speak of since the implementation, over 4 years ago. It's a real testament to how well Doxim ECM works."

Chris Maia

Gilmore believed that the Doxim solution could also meet the needs of other clients with similar business models. True to this belief, since winning the initial RFP, Gilmore has rolled out Doxim Enterprise Content Manager to a number of other telecom and energy clients.

THE FUTURE

Recently, the energy retailer decided to provide clients with on-line access to bills and statements, via their SAP client portal. They asked Gilmore to set up batch download of PDFs from the Doxim repository to facilitate this. Gilmore believed there was a better solution and worked with Doxim to develop an open interface to the energy retailer's SAP portal using encrypted URLs. This allows documents to be called, on-demand from the Doxim repository, for direct viewing through the customer portal, without having to traverse SAP. The approach not only exceeded the energy retailer's security expectations but also required minimal development effort and zero additional technology implementation.

"The solution that Doxim built for our customer's client portal uses a novel interface methodology," explains Chris. "So it should be easy to roll out to other customers, regardless of their back-end ERP. Again Doxim has helped us to develop a new capability that we can commercialize with other customers."

Chris Maia

Gilmore is now planning to help other clients implement customer self serve offerings. Gilmore and Doxim are developing a way to append electronic inserts to bills and statements viewed on-line. This will allow Gilmore's customers to enjoy the saving of print suppression, without losing the promotional value of the inserts that normally accompany their printed bills and statements.

"I guess you could describe the relationship between Gilmore and Doxim as the ideal partnership. It came together on the back of a specific opportunity and has blossomed and grown ever since. Doxim is always there to lend a hand or to develop an innovative new capability to help us with new business acquisitions that have driven appreciable bottom line results for our company."

Chris Maia

⋮ GILMORE DOCULINK

Doxim Inc. provides a full suite of enterprise content management products and services that together provide a web-based alternative to the printing and mailing of customer-centric documents such as statements, reports, client records, cheque images and transaction records. Doxim serves the financial services marketplace across North America, with over 300 clients in banking, credit unions and investment brokerage. These organizations work with Doxim to improve their client communications, streamline document access, meet compliance requirements, and reduce the expense, work effort and environmental impact associated with the creation, delivery and archiving of business critical documents. Doxim is a SAS 70 and CICA 5970 certified organization.

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