

Dollar Energy Fund

Business Profile

Dollar Energy Fund, the 4th largest fuel fund in the country, supplies assistance to individuals who need help paying energy bills.

Key Outcomes

Increased call answer rate within the first week of use.

Ability to monitor in-bound and outbound calls by CSR's, making billing more accurate.

Insight into CSR's daily activities.

Ease of use for customer service representatives.

Industry

Dollar Energy fund is a not-for-profit fuel fund.

TrueFit Solution

Implement Microsoft Customer Relationship Management (CRM) and custom enhancements.

Customer's Comment

"TrueFit presented an all encompassing solution. We can definitely grow with it."

-Sean Smiles

Director of Information Technology

Dollar Energy Fund Increases Call Volume 10% in One Week with Help from TrueFit Solutions



Dollar Energy Fund was founded in

1983 with the mission of supplying assistance to individuals who were unable to afford the high cost of utilities during an energy crisis. Built upon the concern of community, religious, and business leaders, Pittsburgh, PA-based Dollar Energy Fund has grown to become the 4th largest fuel fund in the country, both in funds granted and clients served.

The client base they serve is broad, including both the regional utility companies and individuals in need of financial assistance to pay their energy bills. Last year, Dollar Energy Fund helped 188,000 clients find a solution to their energy needs. They currently partner with 11 utility companies in Pennsylvania, New Jersey and New York who match the incoming donations dollar for dollar, and 100% of that money is used to supply utility grants for those in need.

Business Situation

Dollar Energy Fund is a call center-based organization. Needy individuals contact one of 15 customer service representatives (CSRs) who attempt to address their needs in a timely manner. When the process was reviewed, it was discovered that the CSRs had no highly effective way to track follow-up calls, customer contacts, or what had already been done with a particular individuals account, because the system was essentially paper-based. These inefficiencies increased the time that it took to respond to each customer request.

"It was an inefficient way to do business," says Sean Smiles, Director of Information Technology for Dollar Energy Fund. "We were using our own internally-developed software, which could capture the basic information, but it could only handle tracking of one of our many assistance programs, and we were unable to cost-effectively augment the software." They also were unable to determine how CSR's were spending time, making it difficult to track for accurate billing to the utility companies, who make separate donations to cover administrative expenses.

With an inability to maintain or change their existing system, both customer service representatives and their customers were frustrated. Because they wanted to better serve their individual customers, as well as the utility companies, Dollar Energy knew they would have to find a solution which addressed the problems of their current system, while allowing room for growth.

Dollar Energy Fund had been introduced to TrueFit through a monthly seminar which introduced the benefits of Microsoft Customer Relationship Management. Dollar Energy decided TrueFit would be able to provide them with a solution that would ultimately benefit their customers.

The Solution

After an evaluation, TrueFit decided that Microsoft CRM, Axonom PowerTrak and some custom development would help Dollar Energy solve the problems they were facing. TrueFit worked closely with the Dollar Energy team to understand

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Front Row, Left to Right: Nick Meddis (Director of Operations & Finance), Cindy Datig (Executive Director), Mary Sally (Consumer Service & Skills Center Manager).
Back Row, Left to Right: Becky Biddle (Director of Development), Sean Smiles (Director of Information Technology), Jeff Jameson (Director of Business Development), and Jean Browne (Manager of Programs & Personnel).

their existing business processes in order to design and develop the right customer service solution for their needs. This included the creation of custom user interface screens to deal with various customer situations and the important ability to track customer service representatives' time on a minute-by-minute basis to provide accurate statistics to the utility companies. Another capability introduced was the automatic creation of activities for further follow-up by the CSR.

"TrueFit took the time to understand us and what our existing processes were," says Smiles. "A lot of face time was put in and we were never left in the dark. They made sure to keep us up to date."

Benefits

During the first week using the new system, they have already seen an increasing call answer rate. "Our first week was one of our highest ever," says Mary Sally, Customer Service Manager at \$ Energy Fund. The call answer rate has increased by 10% in the first week of use and the trend will likely continue.

With the solution now in place, Dollar Energy now has a full understanding of how the CSR's spend their day. Inbound and outbound calls can be tracked, which helps accurately bill the utility companies. The solution also helps gauge when a new service can be introduced through the monitoring of CSR activities. The solution also made the implementation of changes easier on the organization, because of the system being web and network based. Instead of making individual changes to each CSR's computer, they could make changes to the whole system and have it implemented throughout the organization.

"Our customer service system is simpler to maintain and use because it is web and network based," says Smiles. "With updates in one place, this solution is a lifesaver and a time saver. TrueFit presented an all encompassing solution. We can definitely grow with it."

About TrueFit

TrueFit combines inspiration and collaboration to create technology solutions that truly fit a company's needs and enable that organization to work better, faster and smarter. Our technology solutions are business solutions that empower individuals and organizations to be more flexible, agile and responsive. TrueFit partners with companies and organizations in manufacturing, distribution, health care, financial services, professional services, and a host of other industries and professions. Founded in 1997, TrueFit is headquartered in Pittsburgh, PA. For more information, visit www.truefitsolutions.com.