carewatch
supporting independence with care at home

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BUSINESS CHALLENGE

Carewatch faced a number of challenges including the need to improve the quality of document-based customer communications, streamline the process of creating invoices to meet a range of customer needs, and respond faster to customer requests for changes to invoice content and design. The company also wanted to take control over document creation and eliminate reliance on an external supplier.

TRANSFORMATION

Carewatch worked with Macro 4 to implement its Columbus customer communications management solution to handle the creation of invoices in multiple customized formats and allow document layout, design and content to be changed easily. The company also opted for a solution that could meet a wide range of customer communications requirements, including web and mobile delivery of business documents, as part of the company's digital transformation strategy.

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> **Julie Room,
> Sales Ledger Manager,
> Carewatch**
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TAKING CONTROL OF CUSTOMER COMMUNICATIONS

CSN Care Group, trading as Carewatch, is a leading, national provider of care services to help people stay independent in their own homes.

Carewatch delivers over 170,000 hours of care every week, with more than 8,000 carers in the UK, and over 100 company-owned and franchised offices.

The company was looking for a way to improve the quality and control of document-based communications with its customers, which include local authorities, NHS Trusts and clients who pay privately for care services.

BUSINESS BENEFITS

FASTER INVOICE DESIGN
Layouts are now created in minutes rather than weeks

IMPROVED SERVICE QUALITY
A speedier response to customers' invoicing needs

LOWER-COST DOCUMENT CREATION
with no need for third-party assistance

A PROFESSIONAL BRAND IMAGE
with enhanced invoice design

A SIMPLER INVOICING PROCESS
using fewer document templates

POTENTIAL FOR INTEGRATED COMMUNICATIONS
A single system can be used for print and digital delivery

THE CHALLENGE

At Carewatch, invoices are an important form of customer communications, which often incorporate a detailed breakdown of the visits and time that employees spend providing care services to individual clients in their homes. All invoice data are generated by the company's billing and rostering application, which is used by Carewatch offices throughout the country to log carers' timesheets. However, the process of creating and modifying the invoice templates used to create invoices was very problematic, as Julie Room, Sales Ledger Manager at Carewatch, explains:

"We issue around 63,000 invoices a year to a range of clients, many of whom have their own specific invoicing requirements. For example, some clients ask us to exclude any details that could identify individuals receiving care services, in order to meet their privacy obligations. Other changes, such as new company addresses or branding, are driven by us. Making these adjustments was a laborious process because we couldn't do it ourselves. Every change involved technical development work being carried out by the company that supports our rostering software."

Modifying invoice templates to meet new customer requirements was a lengthy process. Whenever a change was needed, Carewatch would have to email their requirements to the rostering software provider and wait for the work to be completed. A charge was also incurred for each change.
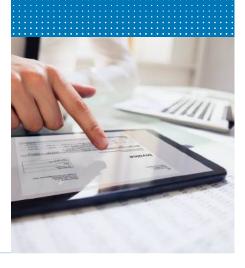
"Often several calls would have to be made to the rostering software company to explain our requirements, as there was scope for misinterpretation," said Julie Room. "Delays – which might run to days or sometimes weeks – could potentially hold up invoicing. And of course our business is so important to people's welfare that once we're contracted to start providing care services on behalf of a new customer we would need to start immediately, even if the new invoice template wasn't ready."

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THE SOLUTION

Following an in-depth supplier evaluation, Macro 4's Columbus DoXite document composition software, part of the Columbus suite for enterprise information management, was selected to simplify the invoice creation process. Columbus DoXite is specifically designed to help organizations easily generate tailored documents on a large scale, in a wide range of electronic and printed formats, without the need for programming skills.

While Carewatch considered other solutions that could meet the immediate invoicing requirement, an important reason for choosing Macro 4 was the broader scope offered by the Columbus suite, which enables companies to transition easily from paper to digital communications and can handle all types of business content, such as customer correspondence, pay slips and financial reports.

"We could see that Macro 4's Columbus software has the potential to help us in other areas such as embracing web and mobile delivery of a range of business documents. It made sense to choose one trusted technology partner who can help us improve both printed and digital communications in a totally integrated way, rather than just providing a single 'point' solution," said Paul Clutten, IT Director at Carewatch.

Paul Clutten also remembered Macro 4 as a very dependable IT supplier to a company he had worked for previously. That company used Macro 4's Columbus software for electronic invoicing and the system ran so smoothly that the IT team had no need for technical support: "To my mind it was really positive that we never really had to call on Macro 4 again; once installed Columbus just did what it was supposed to do. That made a strong impression on me," said Paul Clutten.

Columbus DoXite went live at Carewatch after a successful proof of concept. Following a three day on-site training session delivered by Macro 4, Carewatch was able to take over the document creation process that was previously handled by the rostering software provider. Now, invoice-related data generated by the Carewatch billing and rostering application automatically feed into Columbus DoXite, which creates final format documents based on a range of templates designed and maintained by Carewatch staff.

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IT Director, Carewatch**

THE BENEFITS

Commenting on the success of the project, Julie Room said, "We wanted to find a quick, easy way to create and amend our own documents in-house so that we could avoid delays, improve service to customers, reduce costs and enhance the appearance of our invoices, and that's exactly what Macro 4's solution lets us do."

Using Columbus DoXite, Carewatch now has complete control over document design and can select which information from the billing and rostering system is included in its invoices, based on business rules.

Carewatch users can design their own document templates with ease, adding dynamic graphical content and altering the message, appearance and document format to suit the individual recipient. As technical development skills are no longer required, the entire process can be managed in-house, which has eliminated the costs and delays experienced previously.

Ola Adewale, a data analyst at Carewatch, who helps to manage the invoice templates, said, "Columbus DoXite is very easy to use, so we can update and improve our documents quickly. Common elements like logos can be changed in just one place and then automatically applied to every document type that's affected, which saves additional time. Now we can make changes in a couple of minutes instead of a couple of weeks. If a customer needs additional information on their invoice or wants something presented differently to make it clearer or simpler to understand, it's now very straightforward to change, whereas before it would have been much more difficult."

The ease and flexibility that Columbus DoXite provides for modifying document content has enabled Carewatch to rationalize the total number of templates that are now in use from around 40 down to a dozen, which further simplifies the invoicing process.

Looking ahead, Paul Clutten said, "As well as producing time and cost savings, Columbus DoXite will help us maintain a strong brand image by producing highly professional printed documents. The additional digital delivery functionality offered by the Columbus suite also gives us plenty of options that can help us enhance our mobile and web-based communications in the future."

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THE NEXT STEP
Read about other companies who have used Macro 4 software solutions to transform their organizations **www.macro4.com/resources** or contact us to learn more.

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