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BUSINESS CHALLENGE

Wolseley faced a number of challenges in trying to encourage its customers to switch to electronic invoicing. The company's existing solution delivered a poor customer experience with a complicated sign-up process and limited self-service capabilities, which meant few customers were registering to go paperless. To deliver a better digital service and cut down the high number of incoming customer requests, Wolseley also wanted to make a wider range of documents available online through a new self-service portal.

TRANSFORMATION

Wolseley worked with Macro 4 to deliver a user-friendly, one-stop eBilling solution with comprehensive self-service capabilities. The new system, based on Macro 4's Columbus enterprise information management platform, has a simple sign-up process and is designed to optimize the customer experience. Customers can easily access a seven-year history of invoicing and POD documents in one place. Existing eBilling customers have switched over quickly to the new solution and the company is confident it can now transition all customers to digital.

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> Our customers are increasingly looking for digital solutions to help run their businesses. If we don't provide them, they'll go elsewhere. We knew it was time to replace our old eBilling system with a more comprehensive self-service offering – and adopt a truly digital-first approach. It was all about making life easier for our customers so they keep coming back to us.
>
> **Roger Connett,**
> **CTO, Wolseley**
> "

IMPLEMENTING A DIGITAL-FIRST INVOICING STRATEGY

Wolseley is a leading supplier of plumbing, heating and cooling products to the trade, with nearly 600 branches throughout the UK.

As part of its digital transformation strategy, the company wanted to create a new eBilling service that would deliver an industry-leading customer experience and attract the new generation of plumbing and heating engineers.

Wolseley partnered with Macro 4 to create a new, one-stop eBilling solution based on the Columbus enterprise information management software. The new system is designed to be simple and easy to use to encourage adoption by customers.

BUSINESS BENEFITS

AN INDUSTRY-LEADING CUSTOMER EXPERIENCE
with a simplified customer registration process and enhanced self-service

A REDUCTION IN CUSTOMER REQUESTS
as customers have online access to a seven-year history of all documents

A FAST TRANSITION TO DIGITAL
14,500 customers switched to the new solution within six months

A DIGITAL-FIRST CAPABILITY
All future customers will now benefit from the convenience of eBilling

ONE-STOP EBILLING DELIVERS A FRICTIONLESS CUSTOMER EXPERIENCE

"We produce around 1.4 million invoicing and proof of delivery (POD) documents for our customers every month," said Roger Connett, CTO at Wolseley. "It's much more efficient all round to make this information available digitally rather than on paper, and of course there is a huge cost benefit. Macro 4 has helped us to show customers that it's a better alternative by making the eBilling process frictionless and a pleasure to use."

Wolseley now offers a simple registration process on the company website wolseley.co.uk to let customers sign up for eBilling. They can choose to have their documents automatically emailed on a daily, weekly or monthly basis and they also have access to a self-service portal where they can view their documents – including all invoices, credit notes, statements and PODs for the last seven years.

Previously Wolseley had outsourced its eBilling to a third-party document management company. However, only around a third of invoices were being sent electronically, and getting more customers to switch to digital was proving difficult. It was felt that a more user-friendly service that offered greater functionality to customers would encourage take-up by customers.

Part of the issue was that previously only outstanding invoices could be viewed online and even these disappeared from the system once they were paid. PODs were not available for self-service at all, which was unhelpful for customers wanting to keep track of their finances.

The lack of full self-service led to staff in Wolseley's branches spending significant time and effort handling customer requests for email and paper copies of documents – especially PODs.

"Some large business customers even had our branch staff printing out boxes full of PODs and driving them over to their premises, soaking up a huge amount of time," said Roger Connett.

> "
> Importantly, Macro 4 feels like an integrated part of our internal team. They're a 'low drama' supplier: they do what they promise and are always open to discussion. And they're an important partner for us as we roll out our digital transformation initiatives. We wanted to offer our customers an industry-leading service and with Macro 4's help that's exactly what we've been able to deliver.
>
> Roger Connett,
> CTO, Wolseley
> "

SUPPORTING THE ENTIRE CUSTOMER JOURNEY

Wolseley recognizes that its service to the customer does not end once the product has been delivered and paid for. All aspects of the customer experience have to be easy and intuitive. The Macro 4 solution is designed to support the onward customer journey, including, for example, the admin involved in customers managing their own invoicing and reporting, as Roger Connett explained:

"Many of our customers are self-employed plumbers or heating engineers. Once a job's finished they have to find all the relevant invoices and PODs in order to prepare bills for their own customers – and we try to make this really easy.

"Rather than forcing people to search for individual documents using the invoice numbers issued by Wolseley, they can use whatever reference makes most sense to them, such as their customer's name or address, to quickly pull together all the information they need.

"And with self-service they can now do this at any time that suits them; they no longer have to call the branch during office hours to request copies."

ENABLING A FAST TRANSITION TO SELF-SERVICE

Within six months, all 14,500 customers who were using the old third-party eBilling service had switched over to the Macro 4 solution, which Wolseley has branded eDocuments (eDocs). The admin workload in the branches has reduced significantly because customers can now access all their documents including PODs via self-service.

New customers are now automatically signed up to paperless billing and Wolseley is confident that with the improved functionality and better experience delivered by the Macro 4 solution the company has the technology and systems in place to meet its digital transformation goal of going fully paperless.
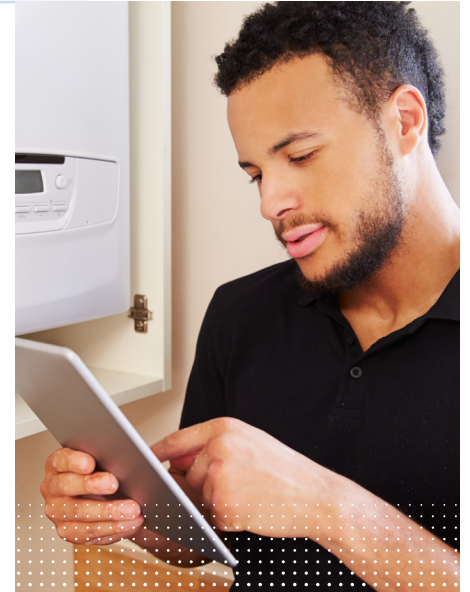
> Many customers have commented on how easy the new system is to use, as well as how convenient it is to view invoices and corresponding PODs in one place. There is a marked improvement in the overall customer experience.
>
> Roger Connett,
> CTO, Wolseley

THE NEXT STEP: GOING FULLY DIGITAL

"Over the next 12 months our objective is to transition the rest of our paper-based billing customers to our digital service. Those who receive more paper documents currently or put in regular requests for copies are being transitioned first," said Roger Connett.

As more customers sign up, Wolseley expects to reap additional benefits from going digital, including savings in paper and postage. The company also expects that by making it easy for customers to access documents online there will be fewer payment delays and improved cash flow.

The new eBilling solution is providing an end-to-end digital offering to the company's many small and medium sized business customers. For corporate customers, Wolseley also offers the option to access financial documents via EDI, known to Wolseley and its customers as eInvoicing.

WORKING WITH MACRO 4

Wolseley evaluated multiple suppliers before choosing Macro 4, a longstanding technology partner whose Columbus information management solutions were already being used successfully throughout the business.

"It helped that Macro 4 was a trusted supplier," said Roger Connett. "However, the number one reason why we chose them was because they stood out against the competition, meeting the business requirements better than anyone else. We didn't want a vendor who would need to go on a learning curve to do what was required. Macro 4 gave us confidence in their ability to deliver, showing us several similar systems they had already implemented for other customers."

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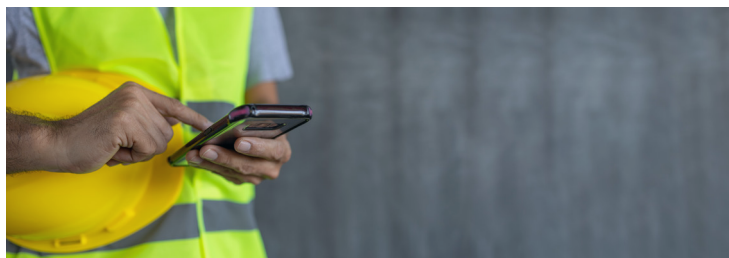
THE NEXT STEP

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

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