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SUCCESS STORY

ENGIE Italia

Industry
• Energy

Solutions
• OpenText Documentum
• OpenText Extended ECM for Salesforce
• OpenText Intelligent Capture

Partner
• PIC SERVIZI PER L'INFORMATICA

Results

⚙ **Automated processing** for almost 500,000 pages of documentation per month

⧗ **Cut time** spent on document management by 35 percent, with a 50 percent time saving predicted in the future

🚀 **Accelerated delivery** of documents to customer service agents from three days to just 30 minutes, enabling faster support

ENGIE

ENGIE Italia delights customers with seamless, responsive services

Energy provider accelerates customer services with mailroom automation powered by OpenText Intelligent Capture

"By partnering with PIC SERVIZI PER L'INFORMATICA to deploy OpenText Intelligent Capture, we are empowering our support teams to offer higher-quality customer services—helping to nurture the long-term loyalty of customers across Italy."

Francesco Presicce
Manager, IT Business Support
ENGIE Italia

ENGIE, a global energy leader, has delivered gas and electricity to businesses and consumers in Italy for more than 20 years. From its regional head office in Milan, ENGIE Italia strives to accelerate the transition to a carbon neutral economy by designing solutions that reduce energy consumption and respect the environment.

Striving for customer service excellence

To delight its customers and foster their loyalty, ENGIE Italia aims to offer seamless and responsive services. Customer communications play a key role in achieving this goal—and each month, the company processes more than 500,000 pages of documentation. These include energy contracts, customer claims, payment instructions, and more.

Francesco Presicce, Manager, IT Business Support at ENGIE Italia, elaborates: *"Some of our documents, such as customer energy contracts, include a large amount of information. This ranges from basic details such as the customer's name, address, and signature to more complex data such as electricity and gas supply identification codes. To offer a high-quality service to our customers, we must process the information quickly and accurately."*

Some documents—such as requests for customer data under the EU General Data Protection Regulation—require a response within a period of time defined by law, making timely document processing all the more important for ENGIE Italia. To help deliver this capability, ENGIE Italia engages a third-party mailroom service provider to route each document to the appropriate department.

Targeting timely document processing

In the past, the company's mailroom processes depended heavily on manual work. Whenever a customer sent a paper-based document such as a letter or a fax, a member of the mailroom team would review

it, categorize it, and then scan and input the information into ENGIE Italia's Salesforce customer relationship management (CRM) platform.

"This workflow is called dematerialization: the process of digitizing a paper record in a way that preserves the document's legal standing," explains Presicce. *"We recognized a major opportunity to increase our responsiveness to customers and reduce our mailroom costs by automating our document dematerialization workflow, and we decided to look for a new approach."*

Embracing mailroom automation

As the first step on its mailroom automation journey, ENGIE Italia selected OpenText Intelligent Capture. A machine-learning powered enterprise capture platform, the OpenText solution can classify and route all content that that enters the organization—from simple requests such as updates to customer addresses to more complex documents such as energy contracts. Combined with OpenText Documentum for long-term archiving, the solution empowers ENGIE Italia to significantly reduce manual effort in its mailroom processes.

"We aimed to eliminate time-consuming work in the dematerialization of documents such as contracts, claims, and SEPA Direct Debit instructions—and OpenText Intelligent Capture supported all those capabilities practically out of the box," recalls Presicce.

Engaging a trusted partner

Working with its trusted OpenText business partner PIC SERVIZI PER L'INFORMATICA, ENGIE Italia mapped out and tested the new automated workflows, and trained its team of 20 mailroom employees to use the new solution. Today, all documents are managed centrally in OpenText Intelligent Capture, and archived in OpenText Documentum. Using APIs, the company has integrated its Salesforce

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CRM solution with OpenText Documentum, enabling it to import documents quickly and with minimal human effort.

"Being able to manage, classify, and distribute documents to the right person in the organization is very important, both from the regulatory compliance and customer service perspectives," comments Presicce. *"Thanks to our OpenText solutions delivered by PIC SERVIZI PER L'INFORMATICA, we are now achieving a straight-through processing rate of around 95 percent for our mailroom. In cases where manual involvement is required, our mailroom team tells us that OpenText Intelligent Capture is extremely easy and intuitive to use—minimizing the training requirements for new team members."*

Slashing response times

Today, ENGIE Italia processes almost 500,000 pages of documentation per month automatically—helping it to send important information to the correct destination faster, and accelerate key business processes.

"In the past, it could take up to three working days for some document types to reach our CRM solution, which limited our ability to deliver responsive services to customers," explains Presicce. *"Using OpenText Intelligent Capture, we've slashed the time required to import documents into our CRM down to as little as 30 minutes—enabling our support teams to serve customers faster."*

Presicce continues: *"Overall, we calculate that our automated document dematerialization workflow cuts the time spent on managing each document by 35 percent—and we are confident we can achieve a time-saving of up to 50 percent in the future."*

Cutting costs, enhancing services

By reducing the requirement for manual intervention from its third-party mailroom services provider, ENGIE Italia is also unlocking significant operational cost-efficiencies. With an increased straight-through processing rate, the company is on course to realize its goal of faster customer services and lower costs.

Building on the success of its work with OpenText and PIC SERVIZI PER L'INFORMATICA, ENGIE Italia is targeting future enhancements to its document capture workflows. For example, by implementing OpenText Extended ECM for Salesforce, the company could enable native integration between OpenText Intelligent Capture and its CRM platform, further streamlining management and maintenance of the solution.

"At ENGIE Italia, one of our key goals is to deliver responsive customer services while keeping operational costs lean," concludes Presicce. *"By partnering with PIC SERVIZI PER L'INFORMATICA to deploy OpenText Intelligent Capture, we are empowering our support teams to offer higher-quality customer services—helping to nurture the long-term loyalty of customers across Italy."*

About PIC SERVIZI PER L'INFORMATICA

Since 1990, PIC SERVIZI PER L'INFORMATICA has delivered expert IT services and consulting for enterprises across Europe. Headquartered in Milan, Italy, PIC SERVIZI PER L'INFORMATICA has operations in the cities of Turin and Rome as well as London, England.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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