



IGNITING DIGITAL TRANSFORMATION

SUCCESS STORY

Hallsdale Powell Utility District





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Utility District Transforms Customer Service with Digital Forms and Workflow Automation

CHALLENGES

- In-person, paper-heavy customer service process
- No centralized system for tracking digital documentation
- Rising pressure to offer remote, self-service options

SOLUTION

- DocStar Content Management + Business Forms

BENEFITS

- Cut service application processing time in half
 - Delivered a fully paperless, 24/7 online application experience
 - Improved accuracy and reduced CSR workload
 - Enhanced operational visibility with real-time status reports
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About the Company

Hallsdale Powell Utility District (HPUD) is a water and wastewater utility company based in Knoxville, Tennessee. It serves approximately 34,000 water and sewer connections.

Challenges

Time-Consuming Manual Processes

HPUD's customer service process required customers to physically visit the office to fill out service applications. This created a frustrating experience for both customers and staff. The paper-intensive process forced CSRs to collect customer information in person, make copies of IDs while customers waited, and later scan these documents into the system. This high-pressure environment not only increased the likelihood of data entry errors but wasted time, staff resources, and paper.

“It’s a ton easier than it used to be. The customers love being able to apply for service online instead of coming into our office. They’re getting what they want, and our staff is saving time. It’s been a **win-win**.”

Chad Scheidecker

IS MANAGER, HALLSDALE POWELL UTILITY DISTRICT



Limited Remote Service Options

For customers who couldn’t easily visit the office, particularly those moving from out of state, HPUD would sometimes collect information via phone and email. These customers would email photos of identification documents and other required paperwork. While this offered limited flexibility, it created new problems: communication records remained trapped in individual email accounts, with no standardized process or traceability.

Increasing Customer Expectations

As more services moved online across industries, HPUD faced growing pressure from customers who expected digital service options. “Our customers kept asking why they couldn’t sign up for services online,” recalled Chad. With competitors and other service providers implementing digital solutions, the organization needed to modernize while maintaining operational efficiency.

Solution

Implementing DocStar Forms

HPUD had been a DocStar customer for approximately 15 years, primarily using the system for document management in their billing and customer service departments. Working with their long-time implementation partner, they expanded their use of DocStar to include web-based forms, creating a seamless digital experience for new service applications.

The IT team recognized that implementing a third-party system like DocuSign would require additional integration work to connect with their document management system. Instead, they leveraged their existing DocStar implementation to create a cohesive solution that would maintain document continuity and streamline workflows.

Creating Web-Accessible Service Applications

The HPUD team developed web forms that allow customers to complete service applications online. These forms enable document uploads for required items like driver's licenses and rental agreements, connecting directly to HPUD's website and customer portal. The implementation included custom logic to guide customers through the application process based on their specific circumstances.

"We started with a basic template, then I customized the logic and layout to match our GM's requirements," explained Chad. "We were able to build out the entire workflow exactly how we needed it."

Developing Custom Workflow Automation

The implementation team created automated workflows that route completed applications to appropriate CSRs for processing. The system enables quality control processes with secondary reviews, ensuring accuracy in account setup. Payment collection is facilitated through email links that are automatically sent to customers, with confirmation numbers attached to the documentation upon completion.

All service application documentation is stored in a centralized system and tagged to customer accounts for easy retrieval. This creates a complete record of the account setup process that can be accessed by authorized personnel throughout the organization

Benefits

Streamlined Customer Service Process

The implementation of DocStar Business Forms has significantly improved HPUD's customer service operations. Account setup time has been reduced to approximately 5-7 minutes per application, cutting processing time in half. CSRs are freed from high-pressure counter interactions, allowing them to process applications more methodically and with fewer errors

The elimination of manual data entry has reduced error rates, while the paperless process has eliminated waste associated with printing and copying documents. Enhanced quality control through automated review processes ensures consistent service delivery and accurate account setup..

"Our customer service team loves it. Previously, our staff had to take customer information at the counter, walk to the printer, make copies, and then hand everything back. Now it's all digital. We've **eliminated** all that **paper waste** and **streamlined** the **entire process**."

Chad Scheidecker

IS MANAGER, HALLSDALE POWELL UTILITY DISTRICT

Improved Customer Experience

Customers no longer need to visit the office to apply for services. The service application process is now available 24/7, allowing customers to apply at their convenience. The online forms provide clear guidance on required documentation, resulting in fewer incomplete applications and faster service setup.

HPUD has created a modern, digital experience aligned with customer expectations. "The feedback has been overwhelmingly positive," noted Chad. "Now we simply direct customers to our website where they can complete the service application and upload their documents. We notify them when everything's ready, and everyone appreciates how straightforward the process has become."

Enhanced Operational Visibility

DocStar Business Forms has significantly improved operational oversight for HPUD's management team. The system automatically generates daily status reports that provide a clear picture of pending applications and workflow progress.

"Every morning, I receive an automated email summarizing our current workload," said Chad. "This gives me immediate visibility into how many service applications we need to process that day, typically between six and ten. Our team can plan accordingly and ensure nothing falls through the cracks."

The powerful search capabilities have transformed how staff access customer information. Instead of digging through paper files or navigating multiple systems, employees can instantly retrieve complete customer and address histories.

Operational Efficiency and Cost Savings

HPUD has achieved concrete operational benefits that extend well beyond faster processing times. Reduced paper consumption has lowered supply costs, while more efficient use of CSR time has optimized staffing resources. The system has created potential for staff optimization through process efficiency and improved scalability for handling service requests.

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1-888-752-7877

www.docstar.com | docstar@docstar.com