

CASE STUDY



Solving an Email Nightmare

The Scottsdale, AZ Water team struggled with managing documents for their rebate program, facing inefficiencies due to an outgrown manual process.

CHALLENGE:

The Scottsdale, AZ Water team runs a comprehensive water conservation rebate program. To help streamline and standardize operations, each program requires specific supporting documents as part of the application process. Multiple programs required customers to submit a W-9 form and there was concern that customers didn't have an easy way to securely send sensitive personal information to Scottsdale.

Every time an application was missing important documentation, Scottsdale staff had to manually email the customer letting them know what was missing. Additionally, they had to use a separate secure email service for sensitive information related to the W-9 or for larger documents like high-resolution photos that don't attach well to emails. "It was an email nightmare and super hard to track on spreadsheets," said Water Conservation Program Supervisor Elisa Klein.

When the customer responded, the team member had to then download the documents and reattach them onto the project record. This proved to be a time-consuming and manual process.



Profile: Scottsdale Water

Total Customers: 93,000

Location: Arizona

Primary objective: Provide a streamlined rebate platform for secure document submissions while reducing the manual handling of paperwork.

BEFORE

- Time consuming reviews
- Manual document uploads
- Unnecessary errors
- Frustrated customers

AFTER

Simplified process

Clean data

Time saving

(Continued)



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WATER CONSERVATION SPECIALIST,
SCOTTSDALE WATER**

“There was a lot of back and forth with the customer before,” recalls Water Conservation Specialist Jill Brumand. “Sometimes files were too large to be sent by email. Or a customer would submit missing information with a different email address than they applied with. So, there was a lot of digging to find who it belonged to.”

The missing documentation emails were not tied to the project directly. This caused there to be more time spent with documents—so they could be matched to the right project—as well as increased potential for staff errors.



Scottsdale has provided quality drinking water and advanced reclamation services to Scottsdale businesses and residents for

over 50 years.

Currently, Scottsdale Water services over

93,000

active water accounts

SOLUTION:

To address the challenges of missing documents in their rebate programs, the Scottsdale Water Conservation team partnered with Brillion to configure a streamlined solution using Brillion Fulfill.

To help the Scottsdale water conservation department resolve missing documents, the Brillion team configured a new form. Now, during their view process, Scottsdale sends out a pre-configured email template — specific to both the program and the missing document — that contains a link to a project-specific form. The customer uploads the missing documents through the new form, which is automatically uploaded and related to the customer’s project record. “It’s reduced the amount of back and forth needed to pull project information and also gives customers a secure place to upload documents,” says Brumand.



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▲ *Through innovative technology, advanced planning, and local collaboration, Scottsdale Water continues to be an industry leader.*

RESULTS:



Happier Customers (and Staff)

The solution offers a more simplified process for the customer that eliminates the unnecessary back and forth associated with multiple emails. The customer only has to click on a link and drag and drop their information onto the form, and their info is secure. "The email templates allow us to give customers a seamless experience because we can communicate with them directly on the next steps," Klein says.



Cleaner, More Accurate Data

The missing documentation solution enables Scottsdale to have cleaner data. "It's very nice that missing documentation goes directly to the specific project to eliminate potential user error," Brumand said.



Saving Time and City Resources

The form saves time for Scottsdale Water staff by automatically uploading the resolved documentation to the corresponding project record. No more manual uploads means that staff can delegate time to more important things and provide a more seamless experience for the customer. "It's super helpful to track emails and phone calls. Multiple people can work on one application and the customer never knows," said Klein.



ABOUT SCOTTSDALE WATER

Scottsdale, AZ Water has over 93,000 active water accounts. They run a nationally recognized water conservation program for both commercial and residential customers. They have been using Brillion Fulfill to help manage their rebate programs since 2017.

scottsdaleaz.gov/water

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