

Alabama Natural Gas Distributor Energizes Sales Force with OpenText

Centralized content management integrated with SAP® increases employee productivity and enhances service

Alabama Gas Corporation (Alagasco) is the largest distributor of natural gas in Alabama and a subsidiary of Energen Corporation, a Birmingham-based oil and gas exploration and production company. Alagasco provides natural gas to close to half a million homes, businesses, and industries in central and north Alabama.

Since the mid-1800s, when its forerunner supplied natural gas for street lamps, Alagasco has upheld a company commitment to service and expansion while preserving system integrity. Maintaining this forward motion, even within a slow-growth state and challenging economy, requires an ongoing commitment to achieve greater efficiency—a trait the utility company and its Enterprise Information Management (EIM) provider, OpenText, know a lot about.

Pieces of information

“We live and operate in a state that historically, even in robust economic times, offers little growth potential. So it’s a challenge for us to grow our company,” says Jim Rutland, Customer Relationship Management (CRM) Support Manager for Alagasco. “Our focus is to retain customers, then appeal to potential customers who are in close proximity to our gas distribution lines and convert them from competing fuels to natural gas.”

Alagasco competes with electricity and alternative fuel distributors to fulfill the varied energy needs of residential and business locations, from single furnace systems to complex, custom-designed infrastructures. For sales efforts, Alagasco representatives need quick and easy access to direct mail and other marketing material as well as customer leads, load profiles (estimates of expected use), and contracts.

Representatives serving commercial or industrial organizations assist customers throughout construction or conversion installations; managing such projects involves the exchange of many letters, engineering diagrams, photos, and more. At one time, this “more” equated to stacks of paper, folders, and filing cabinets. “Previously, we did not have any kind of sales force automation software and most correspondence related to projects was paper documents,” Rutland says. Information could be difficult to access,

INDUSTRY

Natural Gas

CUSTOMER

Alagasco, an Energen Company

CHALLENGES

- *Ineffective content management to support business processes*
- *Sales process hindered by non-integrated, disparate internal systems*

SOLUTION

- *OpenText Extended ECM for SAP® Solutions*

BENEFITS

- *Easy access to all customer data and documents increases sales representative productivity*
- *Integrated solutions result in internal cost-savings and efficiencies*
- *Consistent, widespread access to customer information leads to improved business continuity*

“When we understood Extended ECM for SAP Solutions would embed documents in SAP CRM that we could not only see, but also route for approval, it was really a no-brainer.”

JIM RUTLAND, CRM SUPPORT MANAGER, ALAGASCO

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as even emails and files stored electronically were scattered and isolated from SAP.®” Unless you were here to live through it, you couldn’t begin to understand how there were pieces of information on paper, pieces of information on an individual’s PC, and pieces of information that were stored in shared drive locations,” Rutland laments.

Disparate data sources could hinder ongoing management and project transfer. “A lot of times, customer opportunities stayed open for years. It’s possible you could have two or three people working together on an opportunity,” Rutland says. “Also, you would not want to be the representative to follow someone who retired—it could mean you were essentially starting over because you had no record of what had been done previously.”

Centralized content management, shared workspaces

Alagasco wanted to empower its representatives with a universal, consistent method for managing all the information related to sales opportunities. Early on, the team used a third party solution but, as Rutland recalls, “It was a pretty tedious process and it had reached the point that it was not going to get any better. The solution was limited and the main drawback was that it was not project-related. It was just a repository of documents, and attempting to tie those back to a project became a really tedious task; we were working to get all of the files that were stored in users’ desktops and shared drives in one location in relation to the project they pertained to.”

The company implemented SAP CRM to centralize and share transaction-based customer information. Primarily used by sales and customer service representatives, a lot of content was previously only accessible outside SAP in multiple, disparate systems.

Influenced by past success with OpenText solutions—especially their effective integration with SAP and other providers—Alagasco upgraded to the latest version of OpenText Extended ECM for SAP® Solutions, version 10, in March 2012. The solution, also sold by SAP, extends the transactional process management capabilities of SAP ERP with comprehensive ECM capabilities, including document management, records management, and collaboration. For Alagasco, this integrated SAP-ECM functionality enables them to manage structured content such as orders, contracts, invoices, and other transactional data, as well as unstructured content including emails, videos, presentations, and more.

Extended ECM for SAP® Solutions, version 10, gives Alagasco the ability to marry document management and collaboration with SAP CRM. Workspaces in Extended ECM for SAP® Solutions tie content to the customer profile in SAP, enabling all documentation and SAP structured data to be accessible in a central repository. The repository provides integrated storage and archiving services for all content and metadata, regardless of the originating system. Alagasco representatives now have a project-specific place to brainstorm, develop, share, and approve files, materializing as a workspace directly within their SAP CRM system. Previously, users logged in separately and toggled between systems to view material. “It’s simplified quite a bit now,” notes Janet Hamm, Document Management System Manager for Alagasco. “It’s like taking that OpenText Content Server window and inserting it into an SAP screen; you enter a search term into CRM and it automatically shows the workspace below it. Extended ECM for SAP® Solutions is doing the search automatically behind the scenes.” The OpenText solution also enhances records management by automatically purging records that have met established retention periods.

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 CRM SUPPORT MANAGER, ALAGASCO

Efficiency for sustainability and growth

As a utility company specializing in high-efficiency results for its clients, Alagasco appreciates high-efficiency gains powered by Extended ECM for SAP® Solutions. Increased employee productivity and enhanced communication are efficiencies that offer a competitive edge.

Improved services

Using Extended ECM for SAP® Solutions, Alagasco representatives pursue leads, address questions, and close deals with consistent, comprehensive access to business process content. A positive customer experience is maintained across personnel—retiring and new—and across operational departments.

The OpenText product unites SAP ERP and ECM in a single solution, offering a comprehensive view of key business processes from a convenient interface. “Integration is important to us because we have such a large volume of content as it relates to operations in our document management system,” Hamm explains. Rutland concurs, noting, “When we understood Extended ECM for SAP® Solutions would embed documents in CRM that we could not only see, but also route for approval, it was really a no-brainer. Users can do it all within CRM from start to finish.”

Close to 160 Alagasco sales representatives and other customer-facing employees use Extended ECM for SAP® Solutions to gather and manage material with greater ease and reliability compared with previous methods. “At the beginning of a sales opportunity, we have a related workspace,” Rutland explains. “Files are fed into that workspace where it is stored with that opportunity.” Some spreadsheets and other documents are automatically populated and routed for approval. “Users like the fact that when they

come into the opportunity, those spreadsheets have already been created and are sitting there. Our representatives simply go into the appropriate spreadsheet, complete the information, save it back to the workspace, and initiate the workflow. Then, they’re notified when it is approved.” If the process is delayed or there are multiple reviewers, users may check the status at any time. “Extended ECM for SAP® Solutions keeps them from going to different programs to look for different bits and pieces of information,” Rutland says. “Everything related to a project is housed in that workspace, so it’s a neat, tidy, all-in-one location.” When new employees acquire existing accounts, these workspaces prove invaluable, says Rutland. “All the documentation is there. It gets new employees up to speed a lot faster.”

Competitive advantage

“Being in a price-competitive industry, we do the best we can to keep our rates competitive,” Rutland says. While natural gas prices fluctuate with shifting supply and demand, time- and cost-savings resulting from efficient management can add a balancing effect, keeping rates affordable for customers and profitable for the company. Convenience and productivity gains with OpenText translate to savings; in fact, OpenText workflow capabilities enabled Alagasco to eliminate redundant applications and their associated costs. “We were able to take away two or three programs we were using as a result of the combined workspace in SAP,” Rutland notes. “Still—working on documents in one workspace—I don’t know how you would put a dollar benefit on that,” he adds. “Coming from where we were to where we are now is a huge difference and it’s only going to get better as we go forward.”

For added competitive advantage, Extended ECM for SAP® Solutions helps companies like Alagasco provide customized designs and promote non-stop productivity—efficiencies customers want in a chosen provider.

Alagasco selected OpenText for its deep integration with SAP and expert guidance. “We appreciate the work OpenText put into our implementation,” Rutland notes. “There were obviously some challenges when we were the first to implement the upgraded version of the solution, but OpenText did a great job of helping us get it up and running.”

As a result, tales of efficiency for updated systems are spreading. “As other users are becoming familiar with the functionality that has been provided in CRM and elsewhere, it is generating more requests for other areas to have similar workspaces,” Hamm says. The natural gas utility company plans to expand OpenText capabilities, adding contract management notifications to CRM; applying records management to content within the OpenText Vendor Invoice Management for SAP® Solutions application; and expanding the use of OpenText Enterprise Connect, which integrates content management within the Microsoft® user environment. A strong relationship between Energen and its subsidiaries and OpenText will serve as a foundation for the future.

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