



BIRCH

Communications. Connectivity. Commitment.



Birch gains 50% reduction in order processing time with Trinisisys-based online solution.

Summary

Birch was founded in 1996 and has built a solid reputation for delivering great service with a very strong commitment to customer satisfaction and product innovation. Birch provides managed communications and information technology services to a target market of small- and medium-sized businesses within 38 states across the U.S. The services include local and long distance voice, broadband Internet access, mobile voice and data, e-mail, voicemail, web hosting, virtual private network, and many other communications and information technology services.

Challenge

Birch Communications wanted to move its sales process from paper to the Web and, in turn, shorten the company's sales cycle and improve customer satisfaction. Their process also mandated support for electronic signatures and business rules enforcement in the solution.

Birch's paper process was challenging in a number of ways. In addition to the sheer number of order forms that had to be completed by sales – one at a time from top to bottom, often entering the same information over and

over again – there were also legal documents that had to be initialed and signed by the customer. The tedious nature of the process meant forms were often filled out incorrectly, and valuable time was lost as paperwork was shuffled back and forth between the company and its customers.



CONNECT

“Once the forms are filled out, a packet is generated and e-mailed to the customer for signing. Consequently, we can process an order in half the time.”

Brad Smith,
Vice President of Sales,
Birch Communications

Solution

The Connect solution delivered the following:

- Sales associates complete all forms online, eliminating the paper forms. This also ensures that certain information only has to be keyed in once, and then is applied to all forms. A lookup feature is used to auto-fill forms with information existing in the company's databases.
- The Convergence platform is able to runs rules on the packet to make certain all required supplementary forms are included.
- The creation of a complete PDF packet is then sent to DocuSign, a secure location where customers electronically sign and move through their packet.

The Convergence platform also allowed Birch to create packets for new customers based on criteria used with existing customers in the same business or industry. In addition, the company can easily amend existing forms, so that as a customer's needs change, they don't have to start over each time.

Result

Today, Birch's sales process is much more efficient and effective.

- Human error is reduced
- Processing orders are 50% faster
- PDF packets generated rapidly
- Secure signatures are captured
- Packets are then archived

"The technology developed by Trinisys allows our sales team to get contracts to customers quickly, and with the auto-populate option in document fields, human error is less likely," says Birch Communications' Vice President of Sales Brad Smith. "Once the forms are filled out, a packet is generated and e-mailed to the customer for signing. Consequently, we can process an order in half the time.

"Trinisys has also helped us streamline our training process for new employees, as it takes significantly less time to familiarize them with one, intuitive Web form than it does with multiple paper forms," he adds



Trinisys is a leader in the delivery of intuitive automation and integration services that connect systems to systems and people to systems. Trinisys has been deployed by Fortune 100 companies and small to medium-sized businesses, processing more than a billion transactions. Built on the Convergence Platform, Trinisys offers solutions that Convert, Connect and Combine non-standard data. For more information about Trinisys, visit www.trinisys.com.