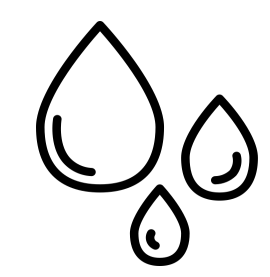# Customer Onboarding Improvement

Brian Cunningham | Antoine Suhas | Caroline Verrecchia
Client Contact: Aaron Shearer | Faculty Advisor: Dr. Maury Nussbaum

WESTERN VIRGINIA WATER AUTHORITY
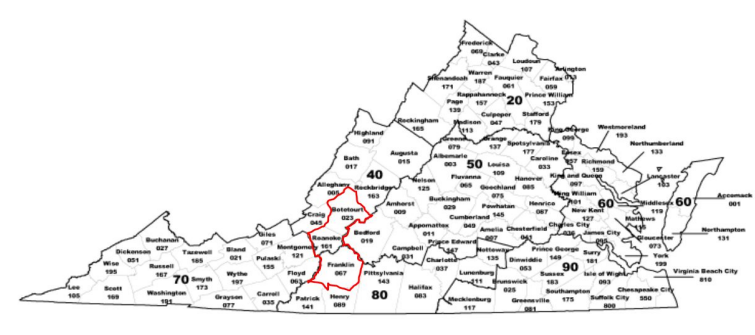
VIRGINIA TECH™

Company Background

62,000
Water service customers

56,000
Wastewater service customers

Serves **local** and **rural**, **commercial** and **residential** customers

Provides services in **6 southwestern Virginia localities**

Problem Statement

The current process of a new customer signing up and obtaining service from WVVA is *time-consuming, inconsistent, and complicated*.

Project Goals

Streamline Current Customer Onboarding Process
- **Increase** understanding and **transparency** of customer onboarding process
- **Decrease time** spent by staff on **manual** and **repetitious data entry**
- **Automate notification system** between departments for work

Initial State

Each department has their own data management procedure using:

A (Access)   X (Excel)

Some specialized departments using:
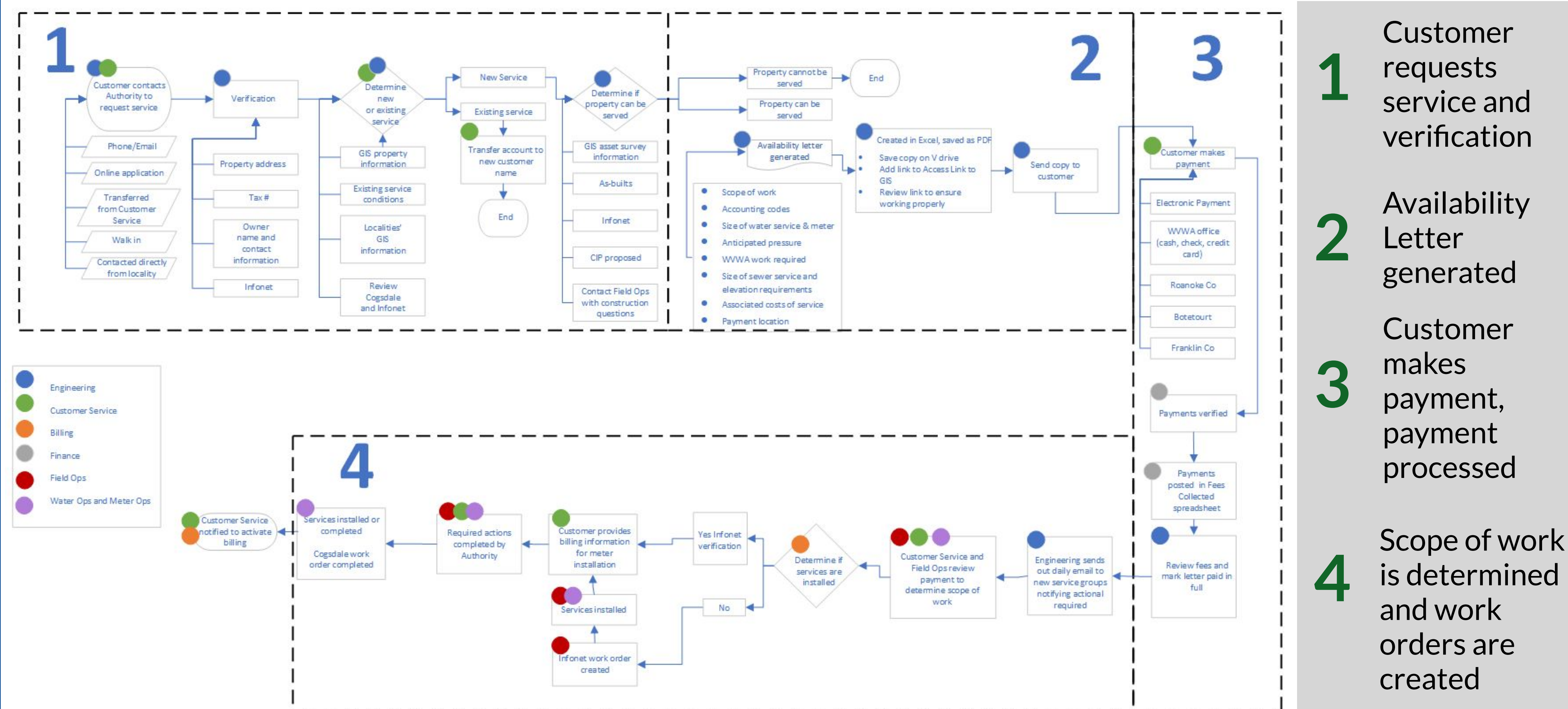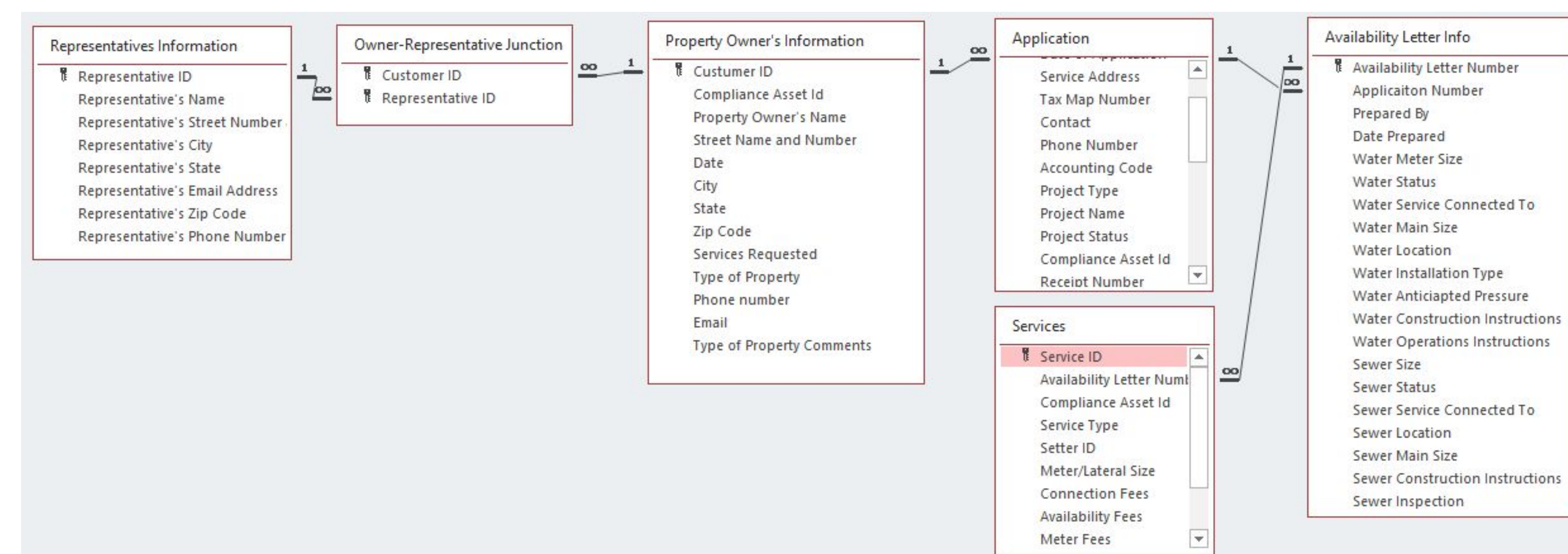
Microsoft SQL Server   COGSDALE

This leads to:
- Lack of transparency of customer status
- Abundance of data-update emails
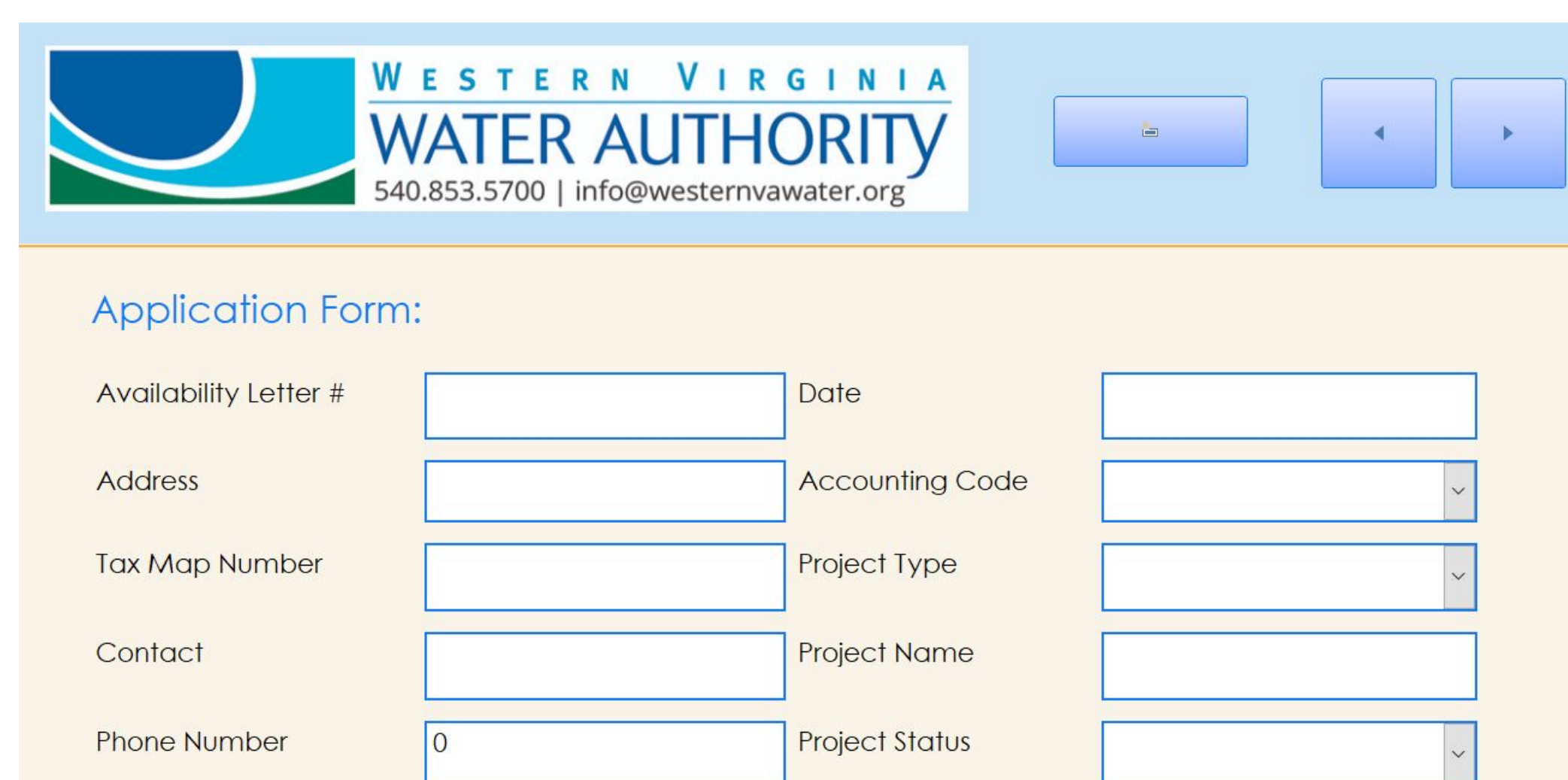- Inconsistent entries
- Confusion

Solution

New Water, New Sewer Process Map

1 Customer requests service and verification

2 Availability Letter generated

3 Customer makes payment, payment processed

4 Scope of work is determined and work orders are created

Access Database and Recommendations

Access Database Relationship Table Overview

SharePoint Integration
- Access database converted to SQL database
- SharePoint site created
- SQL database integrated with SharePoint site through Microsoft Business Connectivity Services (BCS)

Application Form in Access Database

Database Function Summary
- 5 Subforms: Application, Availability Letter, Financial, Property Owner's Information, Services
- Query on Property Address, Owner Name/Email, Availability Letter Number, Application Number
- Customer Tracking through different stages of service request process
  - Automated email sent when customer completes a 'step'

Solution Approach

1. **Develop New Water, New Sewer Process Map**
   - Represent all customer and WVVA staff steps required for a new residential customer to receive water and wastewater services
2. **Establish requirements for centralized data storage system**
   - Accessible and editable by all staff
   - Store all relevant customer information
   - Eliminate need for any locally stored document, spreadsheets, or databases
3. **Create, implement Access database with SharePoint frontend recommendations**
   - Compatible with all existing internal WVVA databases
   - Provide overview of customer progress is system

Implementation

New Water, New Sewer Process Map
1. Conduct department reviews to ensure all relevant steps were included
2. Identified pain points in process to guide final solution

Access Database
1. Stakeholder interviews with Customer Service, Billing, Finance, Engineering, Water Ops, Field Ops, and Meter Ops
2. Determine software requirements from IT Department
3. Build database and gather user feedback
4. Provide recommendations on SharePoint integration

Impact

- Reduction in staff time spent troubleshooting the onboarding process
- Elimination and automation of non-value added steps
- Increased communication between departments
- Increased understanding of the onboarding process as a whole