

# DataView Case Study



Established in 1904, Waitsfield and Champlain Valley Telecom (WCVT) is an independent, privately owned telephone company that provides local and long distance telephone services to the Mad River and Central Champlain Valley regions

of Vermont. Through its subsidiaries Green Mountain Access, a full-service Internet Service Provider (ISP), and Waitsfield Cable, the company also offers high-speed, residential and business Internet, Wi-Fi and digital, standard and high-definition (HDTV) cable television services and programming.

In order to services its customers at the highest levels, Waitsfield Telecom maintains a local, fully staffed Network Operations Center that proactively monitors the network, prioritizes potential issues and alerts, and provides 24/7 technical support and problem remediation.

Jim Lavoie, Vice President of Information Systems for Waitsfield and Champlain Valley Telecom said, "Being locally owned and operating here for as long as we have, we truly understand the needs of our customers. We also understand that staying competitive as a business and providing the level of service our customers expect requires more than just state-of-the-art technology. It also means continually making improvements to enhance the quality and reliability of our services and provide exceptional value to our customers."



## CHALLENGE:

### Legacy, Obsolete Invoicing System Impacting Customer Service

As the company's service offerings expanded and its customer base grew, so too did the number of invoices and other customer-related documents. Over time, the sheer volume of paper and electronic documents—more than 2.5 million documents annually—began impacting customer service response time and productivity.

Lavoie said, "We needed to enhance the entire customer service experience and improve our customer invoice distribution system. The best way to do this was to equip our call center reps (CSRs) with tools to help them access information easier and faster. Once we saw how much DataView could really streamline the way our CSRs do their jobs, we knew it the right solution for us."

## SOLUTION:

### DataView Document Management System

After evaluating a number of approaches and technology solutions, the company selected the DataView Electronic Document Management System from CAI Software.

At Waitsfield Telecom, the DataView system is configured as a series of Folders and Drawers designed to simplify and streamline access to all employee and customer related documents and information.

## Waitsfield and Champlain Valley Telecom

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*"DataView has truly revolutionized our invoice distribution system. We've been able to simultaneously cut costs and enhance customer service. I would recommend it in a heartbeat to other businesses dealing with a manual, out-of-date filing system that's impairing customer service."*

**Jim Lavoie**  
Waitsfield and Champlain  
Valley Telecom

For example, Waitsfield Telecom's DataView system includes more than 100,000 folders with more than 2.5 million individual documents. The system is concurrently accessible by up to 20 customer service representatives. DataView automatically links related documents or documents based on transaction type, so that a single query can conveniently produce multiple documents.

Waitsfield also utilizes DataView to store billing records, reports and statements from the Carrier for the use of the lines as well as from the company's Cable TV service providers. This enables users to access statements or bills in a single location. A separate folder contains documents and information common to the telephone industry, including information related to Easements, Contracts, Work Orders and Dig Safe Records.



"The tremendous speed improvement and ease with which we can locate and view actual copies of invoices — while the customer is on the phone — has saved us time and money. Because everyone is looking at the same document, our reps can easily explain services and answer any account-related questions. DataView is such an essential part of our business today that I'm not sure how we ever got by without it."

"Waitsfield Telecom's success with DataView is typical for our customers," said Frank Motta, Executive Vice President for CAI Software. "DataView has been successfully implemented at many telecommunications businesses around the country and is optimized to address the specific paperwork problems they face every day. It provides a Virtual Filing Cabinet that captures invoices and other customer-related documents in a secure digital repository, auto indexes documents in the correct 'drawer' and folder, and lets WCVT's representatives quickly access the information using DataView's sophisticated search tools."

## WEB-BASED CUSTOMER PORTAL

### Secure 24/7 Customer Access to Their Information

The DataView system includes a web-based portal that lets Waitsfield's customers log-in to a secure website where they can view account information and download documents on-demand. This has significantly improved customer satisfaction by minimizing time spent responding to inquiries, and it has saved Waitsfield Telecom by reducing or eliminating printing and mailing costs.

"The web portal is a great feature," Lavoie added. "Our customers appreciate the convenience of accessing the information on their own time and it helps us avoid the unnecessary duplication of documents and frees up time for our customer service staff to provide the best service we can. There's been nothing but enthusiastic feedback from everyone."

**For more information,  
contact us at (603) 893-9090  
or [www.caisoft.com/dataview](http://www.caisoft.com/dataview).**



## About DataView

The DataView Document Management System makes it easy for customers to quickly store, search and access any type of electronic document. DataView is a unique enterprise archiving and retrieval system that provides document storage and management, electronic data delivery, bar-coding, forms processing and data entry on electronic forms. Globally, over 1,500 leading customers in the medical, manufacturing, utility and government agency industries rely on DataView for their document management needs.

For more information, visit [www.caisoft.com/dataview](http://www.caisoft.com/dataview).

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