

PRO Screening

PROSCREENING SUCCESS STORY

Improving Customer Experience & Employee Job Satisfaction

BACKGROUND

Although ProScreening, a background check provider, had successfully transitioned the client-facing aspects of its business to a paperless environment, many of its back-end operations still relied on manual processes. Customer service staff handled as many as 300 inbound emails every day and, twice a month, accounting personnel stopped all other work to send out between 800–1,000 invoices.

As a growth-driven company looking to scale quickly without adding headcount, ProScreening began exploring what it would take to automate these and other manual workflows. The company also began researching payment processors that could guarantee compatibility with its existing cloud-based ERP system.

“Our goal was to increase capacity, not only to manage the volume of new clients but also to make our department more efficient overall,” says Heather Walker, Controller at ProScreening. “We needed our accounting team members to be more proactive and strategic and spend less time keying in credit card numbers and running payments.”

Specifically, Walker wanted to empower her staff to research hiring trends and surface more data, all in the interest of helping ProScreening’s clients make more informed business decisions.

SOLUTION

Walker was introduced to Esker by one of her existing vendors. After performing her due diligence, she determined Esker’s Collections Management solution fit all of ProScreening’s criteria.

“WE WERE LOOKING FOR A **ONE-STOP-SHOP** THAT COULD **ENHANCE OUR POST-SALE CRM** AND **ACCELERATE OUR AR AND O2C CYCLES**. WE FOUND THAT WITH **ESKER**.”



HEATHER WALKER | CONTROLLER

ABOUT PROSCREENING

Industry: Human Resources
ERP: NetSuite
Solution: Collections Management

Utah-based ProScreening is a premier provider of background check solutions for employers nationwide. It helps employers streamline their background check process by providing a fully paperless disclosure and authorization process.

BENEFITS AT A GLANCE

-  **100%** of customers set up with email within Esker’s solution
-  **Increased** electronic collections to \$2.5 million
-  **Reduced** response time to less than one business day



Of particular interest to Walker and her team was the self-service portal feature of the Collections Management solution. With this tool, ProScreening could provide clients with instant, PCI-compliant access to all essential accounting functions, such as setting up autopay and updating billing addresses. But the portal delivered other benefits as well, chief among them being operational transparency.

"We immediately understood that the portal would make our customers' lives easier. But we were most excited about how it would make our relationships with them better," Walker said.

"Customers, accounting, customer service, and support personnel — every one of these stakeholders now has insight into what's happening with a specific account," she added. "By managing communications within the Collections Management solution rather than email, we can more efficiently route customer questions to the right team and deliver more accurate answers more promptly."



"WE ARE DELIGHTED THAT ESKER HAS HELPED US ACCOMPLISH SO MUCH SO QUICKLY. COLLECTIONS MANAGEMENT HAS REDUCED STRESS WITHIN OUR ACCOUNTING TEAM AND ALLOWS US TO HAVE MORE TRANSPARENCY WITH OUR CLIENTS."

HEATHER WALKER | CONTROLLER

BENEFITS

Solution implementation was completed in six months, after which, ProScreening phased out many of its legacy manual processes. Customers have responded very positively to the self-service portal, but the automation of client communications and collections has had an even more profound impact on ProScreening's accounting team. Results include:

- REDUCED REPORTED STRESS LEVELS**
 among team members by decreasing the volume of daily emails and freeing up bandwidth.
- INCREASED PRODUCTIVITY,**
 allowing for more hands-on client interaction and opportunities to focus on core responsibilities.
- ESTABLISHED STRONGER RELATIONSHIPS**
 with clients due to increased transparency and more efficient and effective communication.
- IMPROVED RESPONSE RATE**
 for incoming requests and questions, answering customer inquiries in less than one business day.
- ELIMINATED PAYMENT BY CHECK,**
 increasing electronic collections to nearly \$2.5 million.
- SIGNIFICANTLY REDUCED AVERAGE DAYS PAST DUE**
 for all transactions, to approximately 19 days.

ProScreening was also able to manage day-to-day operations without an increase in headcount, in spite of continued business growth.



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