



File Handling Efficiency: The Backbone of Customer Satisfaction

A Wolgast Restoration White Paper



An Employee-Owned Company

When Mayhem Strikes... We Strike Back!

File Handling Efficiency: The Backbone of Customer Satisfaction

Dealing with damaged property can be a minor amount of work or a major undertaking. No matter what the workload involves, one thing is certain; it is a big deal to the claimant. The property owner is already in a stressful situation. If they are confronted with more problems than they are already dealing with, they won't be happy. If they aren't happy, then they are going to let people know. It may be in the form of a complaint to the Supervisor, or they may get more public with their frustrations on Social Media. Either way, it isn't an ideal situation for the adjuster or the restoration company they are working with in regards to keeping or creating business. That is why there is a file created for every claim, and every claim must be handled perfectly.

We have successfully utilized the following implementations to move files forward more quickly:

Internal Use of Automated Job Tasking Notifications Targeted to the Appropriate Staff Member Who Handles that Step of the Process

From the first notice of Loss to the completion of the project, we use an internal program (DASH) as an operating system for all claims and files which is set up to send task notifications to the appropriate staff member who handles that step of the process as the file moves along.

When we get a new loss, we enter the job into our program, and it automatically sends out tasks to people. Initially, it goes to the Project Manager's Assistant to put in the notes describing what the job is. From there it goes to the assigned party to upload the work authorization, and then on to the Project Manager to upload the estimate...it's essentially a tasking network to prompt people along the way of what needs to be done and the key points they need to hit in order to make the job more efficient. It relays continual reminders so that tasks do not go uncompleted.

In-House Estimating Staff

Completing the work quickly and efficiently means having a handle on every part of the process at all times. By utilizing an in-house estimating staff rather than relying on outside sources to get the work done, time frames can be better handled and delays can be eliminated.

Systemized Work Flow with Catalogued Forms / Job Form Distribution System

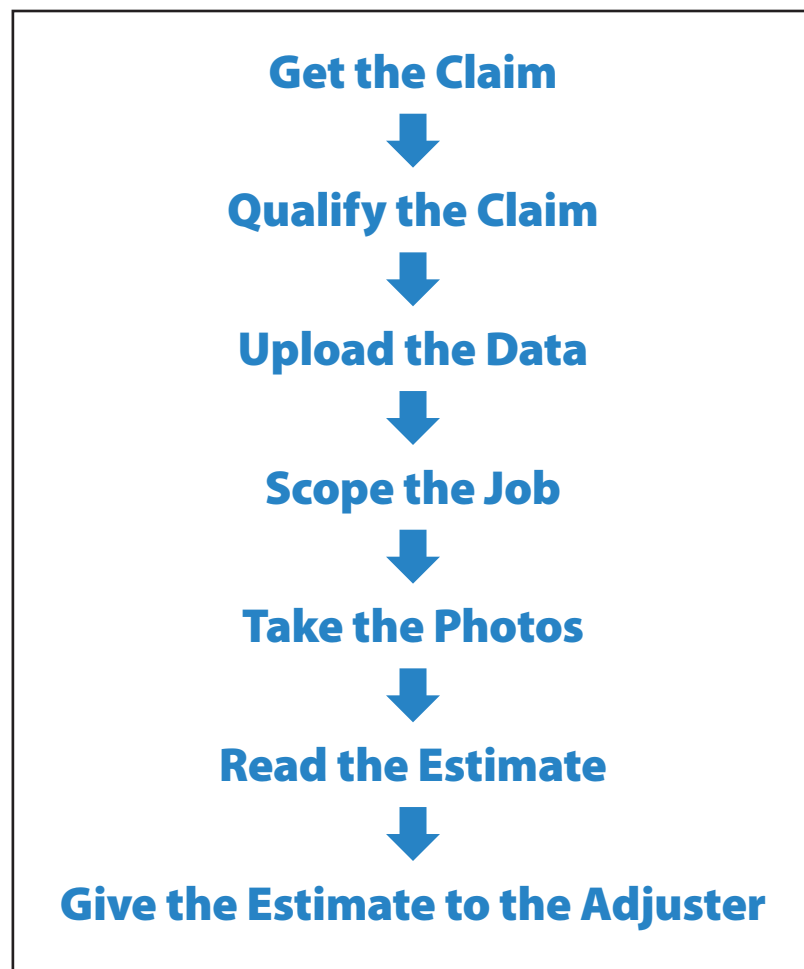
We have a master process file that contains all of our systems and processes that outlines how every section of the work process is completed and indexes the job forms that pertain to that process so that everyone can access them.

Every process is standardized. For instance, if you take photos for a loss; the standards identify which photos you need to take, describing the photos, how to upload photos, and every other step of the process required and how they should be completed.

Cloud Based File Sharing System for Division Wide Immediate Access to Information and File Processing
The distribution system is cloud based in SharePoint so that everyone has shared access to it online and there is a master file system so when a main document is updated, it updates everywhere else as well. In addition, the field staff has all of the information needed to carry out the work in their procedure manual, as well as a file box containing all of the standardized forms required for the work that they carry with them at all times so that they have access to them while they are out on the job.

Standardized Specific Work Flows for Departments and Individuals

All of the processes are laid out in a work flow for each and every department and individual so that each person knows what they are expected to do, when they are to do it, and in what order. For example, a Project Manager's workflow would look similar to the following:



Systemized Reporting of File Status and Variances to Minimize Loss of Efficiency and Transfer of Appropriate Data between Managers, Customers and Vendors

We have requirements that are set standards for reporting so that every three days, the Project Managers are expected to put a status note update in the file as to what has been done; such as "Currently mitigation is underway" and then possibly, "Pulling equipment, mitigation is finished, discussing repairs with the customer." Every status is uploaded and if there is an issue, it is reported in the program. This allows the customers to see the data, the office staff to have the data, and the adjusters get the data so that everyone knows what is going on with the claim. There are also various vendor programs belonging to the vendor, who has assigned the carrier loss, that house that information and receives the updates.

Specialized Software for Data Handling, Tracking and Reporting

We use programs such as DASH, MICA, Fire and Ice, and various other programs to enter data when we are mitigating a job and it collects the data for us in order to streamline the process. Because of the type of work being done, it is essential to report the conditions of the job being done; such as daily moisture readings and the fact that you are drying things that are getting wet, etc.

Highly Trained Administrative Support Team Monitoring Files and Data for Up to the Minute Status Flow and Job Handling

The Project Manager Assistants, Estimating Staff, Field Techs, and Office Manager all constantly follow the jobs in DASH and the Vendor programs as they go through the process from start to finish; checking to make sure that everything is going along with the workflow, that the dates are accurate, and all questions have been answered. We follow this up with daily reporting every morning with all of the Project Managers and staff in order to inform them of status updates required or issues that need to be resolved.

Every job is touched every day. The Project Manager, the Administrative Support Team, or somebody is looking at the file, checking the status, and making sure it is moving to the next point in the system. In other words, as soon as a job is completed, the Project Manager brings up the Certificate of Completion and the Project Manager's Assistant uploads the certificate and enters the completion date, sending the job to Accounts Receivable Department and verifying the job has been finished.

Because proper file handling easily helps to keep everyone informed, it also significantly increases customer satisfaction because their questions are answered in a timely manner and they always know what is going on. It also ensures that their loss will be well taken care of in the time frame that they expect.



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