

TECHNOLOGY WAITS FOR NO ONE.



## CUSTOMER CASE STUDY

**KILOWATT FINANCIAL**  
APPLICATION DEVELOPMENT AND  
SYSTEM MODERNIZATION

**Kilowatt Financial** provides document management and processing services portals for contractors involved in the installation of solar panels for consumers. Through a variety of partners who manage the programs, contractors can facilitate the application process for their clients who wish to apply for both an installation and the funding of those products. Kilowatt Financial's new online portal helps this process run more efficiently by allowing the consumer and contractor to collaborate on the documents required for the application process.

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### SITUATION

Prior to the Axis portal implementation, Kilowatt Financial had created a limited system with some functionality but the process was manual. Prior to the implementation, the processed required manually completing the application with traditional hand keying and then mailing back the form. If there were errors on the application, or if there were missing data, like a signature, the contractor would have to reach back out to the client and send back the forms for completion. It was not so much a portal as it was more of a document library and download site.

Kilowatt Financial clients, the contractor partners, wanted more flexibility in the site. Each contractor would have different forms or unique requirements, and the partners wanted more options to offer both of these to contractors and their customers. This included a custom-branded interface and à la carte options of different programs and loan options.

Kilowatt Financial had worked with another vendor in the past, but they had failed to deliver on both a quality product and solution on schedule.

### SOLUTION

Axis stepped in and took over the project. The new portal now has more functionality, flexibility, and is built on a technological design that's intended for expansion. The new site has the capability for a unique branding for the partner, including custom color palette, logo treatments, and functionality.

The portal now offers a dashboard for the partners where they can choose which forms to provide to the contractor. The contractor now can present these online forms to their clients. The client logs in with a new offer code and completes the form through a step-by-step sequence that not only has an error checking to reduce missing data but also a simple, intuitive interface.

Axis Technical Group's main goal? To keep your company one step ahead of the competition by continually optimizing and updating your technical components in the office.

**Microsoft Partner**  
Gold Application Development

***We now offer an innovative and high tech solution to our clients.  
The system is faster and more efficient than our previous implimentation.***

## **SOLUTION**

Upon completion of the form, an email is sent out to the client for an online signature. With the use of Docu-Sign technology, the clients sign the contract online and sends the completed form back in a couple of easy steps. All transactions are now tracked and made available at a glance through the contractor dashboard. From this dashboard, the partners and contractors can check the status of the applications, including factors such as number of applications open, closed, passed, failed, etc.

## **BENEFITS**

The benefits of the process automation include a massive reduction in paper production, since there is no longer a need to handle and track so many paper-based documents. There are fewer data-entry errors since it is a purely digital database-driven application, and therefore no human errors associated with copying application data from a hand-printed form. The process and workflow are now more efficient, reducing errors and providing a better experience for all parties involved—including the consumer.

The system is designed for growth, as new partners join the program and bring in new contractors. Adding a new portal for a partner now takes less time and still offers plenty of room for expansion.

## **FUTURE**

The system is built on a Microsoft platform including IIS server, Web API, WCF Services, Web Portals, Windows Services, Visual Studio, SQL Server, and coded in C#. New features being considered for the system include the ability to allow the partners to maintain their own site. Partners can now create custom logins and launch an invitation to a contractor to join the program. The custom branding can be driven by the partner if they choose to enable this functionality, and a form library of options can be selected to offer contractors different form and application options.

## **BENEFITS**

Diane Novak, Director of Application at Kilowatt Financial, said, "We now offer an innovative and high-tech solution to our clients. The system is faster and more efficient than our previous solution. It results in faster responses from the customers and quicker responses to their inquiries. The result: our portal moves the process along faster, and everyone wins. We are delighted with the quality of the work Axis had delivered; their implementation has indeed performed on the vision we had for our solution."

Axis Technical Group is a trusted business IT advisor to companies in the mortgage, title, healthcare, energy and financial services industries. The Axis team provide the sophisticated skills and resources of a global consulting firm with a personal, solution oriented approach.

Axis' software division develops Axis AI, a data extraction solution for unstructured documents that helps organizations save time and money and speed decision making.

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