



After experiencing various frustrations related to a lack of automation in their document management process, The Delta Companies came to Kyloe for advice. The solution? Kyloe AwesomeDocs, complete with DocuSign integration.

Background

The Delta Companies is the leading physician and healthcare staffing firm in the United States offering permanent and temporary staffing solutions nationwide for physicians, physician extenders, allied, and therapy healthcare professionals.

Challenges, issues and their impact

Entering data manually into document templates for sending to clients was commonplace, which ate up a lot of valuable time.

"We knew for a long time that we needed to automate our process, but we just didn't know how. It continually caused frustration and back and forth between reps entering information into our CRM, and creating templates manually."

This way of working also meant regular duplication of efforts, ultimately resulting in reduced levels of efficiency.

After waiting so long to find a solution, The Delta Companies wanted to make sure they got something that would fulfil their objectives, first time round.



" In some roles, workload has been reduced by 30 - 40%"

What did the project look like?

The key project objectives were:

- Reduce workload and duplication
- Speed up the document signing and saving process
- Allow reps to focus on relationships

The level of in-depth Bullhorn knowledge held was a key factor in the decision to move forward with Kyløe.

"Kyløe are highly educated in the CRM (Bullhorn) we use and offered creative ideas on how to accomplish our goals, regardless of complexity at hand. Their confidence and teamwork to find the best solution was very reassuring to us."

The Kyløe solution

Kyløe worked with The Delta Companies to really understand the challenges they were facing and where they wanted to go. During this time, it became clear that the Kyløe AwesomeDocs app would help resolve the main issues.

"The ability to send via DocuSign and have documents save back into Bullhorn is priceless!"

April Grace, VP of Operations - The Delta Companies

The Delta Companies now benefit from an automated template process, where kyløe AwesomeDocs pulls required information directly from Bullhorn in the template; no more manual data entry!

Kyløe AwesomeDocs also comes with DocuSign integration, which automates the full document signing process, and then saves the completed file straight back into Bullhorn.



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The result

Since implementing Kyloe AwesomeDocs, The Delta Companies have been able to achieve their objectives and have seen improved efficiency as a result.

"The automation offered by Kyloe AwesomeDocs has reduced workload in some areas by 30-40%, which frees up our reps valuable time. It's enabled us to look at utilizing those reps time in other ways to gain efficiencies and create positive experience for our clients and providers."

The assistance we got from Kyloe was amazing; they're very easy to work with, take a team player approach, and are highly knowledgeable about Bullhorn."

" The assistance we got was fantastic; Kyloe are an amazing group of people!"

April Grace, VP of Operations -
The Delta Companies



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