



DATAMARK

America's Premier *Outsourcing* Partner

Case Study

Real-Time Billing Visibility

for Contact Center

Introduction

In today's customer experience (CX) landscape, data-driven decision-making is essential. One persistent challenge faced by outsourcing providers and procurement teams is the lack of real-time visibility and accuracy in invoicing data. This was the case for our leading 311 contact center client, where outdated, manual billing processes caused delays, inaccuracies, and reduced stakeholder trust.

To address this, our client engaged DATAMARK's Business Engineering team to implement an automated billing dashboard using Microsoft Power BI. The result: a scalable, real-time billing solution that streamlined operations, improved forecasting, and enhanced transparency for internal teams and the client.

The Challenge

The 311 center provides non-emergency assistance to residents across various municipal services. While front-line services were strong, the billing process behind the scenes was outdated and inefficient. Key challenges include:

Manual Reconciliation:



Requiring hours of effort to cross-reference payroll, CRM, and WFM data.

Delayed Invoicing:



Leadership struggled to meet monthly timelines due to process inefficiencies.

High Risk Errors:



Manual handling increased the likelihood of inaccuracies and miscommunication.

Lack Of Transparency:



Stakeholders had no live access to billing data, which impacted trust and satisfaction.

DATAMARK's Approach

DATAMARK followed an Agile and ITIL-based methodology to deliver a real-time billing solution that could evolve with the contact center's needs.

1

Systems Integration

DATAMARK integrated the client's key platforms—Workforce Management, Payroll, and CRM—to build a centralized, real-time billing data pipeline. This ensured consistency and accuracy across all data sources.

2

Pilot, Then Scale

Rather than deploying the solution all at once, DATAMARK launched a pilot phase with a subset of call volume. This:

- Validated data accuracy
- Collected feedback from users
- Enabled iterative design improvements

The pilot's success led to full-scale deployment across the 311 environment.

3

Real-Time Dashboard Development

Using Microsoft Power BI, DATAMARK created a dynamic dashboard tailored to both internal leaders and City stakeholders. Features included:

- Real-time call volume and billing summaries
- Labor cost and pay rate category analysis
- Discrepancy identification and alerting
- Visual insights to support financial planning and forecasting



Outcomes

The automated billing dashboard delivered measurable improvements:

- Eliminated manual reconciliation, reducing billing cycle time by **over 50%**
- Provided **real-time visibility** for internal and external stakeholders. The client was able to view billing data – daily!
- Enabled proactive discrepancy resolution before invoices were issued
- Enhanced financial forecasting through dynamic labor cost analysis
- **Increased client trust** via a transparent, self-serve dashboard experience

Technology Used

DATAMARK Technology leveraged industry leading technology to achieve this real-time billing solution:



Microsoft Power BI:
Real-time data visualization



Custom ETL Pipelines and Data Modeling: Developed by DATAMARK engineers



CRM, Payroll, and WFM Connectors: Ensuring seamless and secure data flow



Leadership Insight

Esteban Dye, Site Leader for several of DATAMARK's contact center operations, reflected on the grand impact the "dashboard had on client relationships and operational agility:



"When we deployed the client-facing billing dashboard, we saw an immediate positive change in our client relationship due to the inherent **transparency** of the process. The client now had **24/7 access** to

the billing dashboard and could see the month building daily as it updates with the billing data. This **empowers** the client to make quick, informed decisions with confidence, eliminating delays on business-critical operational adjustments.

Additionally, the billing process was **automated and streamlined**, thus eliminating any potential errors as there are now built-in checks and balances that validate the data used for creating the invoice in record time. The **speed, accuracy, and transparency** of this process is emblematic of the commitment we have to building strong relationships with our partners."



Why It Matters

By transforming a traditionally reactive process into a strategic, insight-driven capability, DATAMARK empowered the client, a leading 311 contact center to:

- Invoice faster
- Identify and resolve issues sooner
- Strengthen operational relationships through data transparency

DATAMARK continues to support the call center with ongoing dashboard enhancements, reporting improvements, and long-term system maintenance—ensuring the billing process remains efficient and future-ready.