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DeliveryWare

Leading medicinal company
Treating the need for order processing efficiency

With thousands of employees worldwide, leading-edge research and manufacturing operations, and a strong global presence, the company's product lines offer doctors and patients a range of advanced treatments. Technology and constant innovation drive the company's focus on operational efficiency and agility to serve the needs of its customers.

Challenge: Increase order efficiency in response to competitive pressure

With one of its flagship pharmaceutical products facing new sources of competition for market share, the company took action to optimize order processing and customer retention. It launched an initiative to revamp customer service operations and deploy technology to create new efficiencies, support growth without additional headcount and enhance customer relationship management.

Analysis of customer service operations and how incoming orders were handled revealed considerable inefficiency within the organization. With the system it had in place, orders came in by phone or fax and were processed manually. This presented challenges to the company in achieving its strategic customer relationship management objectives, and performance in customer service was not up to the high standards the company had set for itself.

Addressing fax-to-order

The company's process for incoming customer orders includes a CTI (computer telephony integration) system that routes incoming phone orders through the company's SAP CRM application to the appropriate CSR with customer status and order entry information. In addition, up to 200 orders per day, accounting for as much as 10% of total order volume, come in via fax.

The fax orders were processed on a first in/first out basis with no prioritization. As a consequence, the company had no visibility into how many orders came in at a given time. There was difficulty routing orders to customer service. Paper files needed for order dispute resolution had to be manually retrieved. And because many customers paid with credit cards, reliance on paper created potential regulatory compliance issues.

To automate the fax-to-order process, the company considered options including a solution from the CTI vendor as well as software products from Kofax and OpenText along with Esker DeliveryWare.

According to the company's project manager, competency in fax document automation was a key factor in selecting Esker DeliveryWare. "We recognized Esker as a leader in this area," he said. "They just really know what they're doing when it comes to fax-to-order. It was clear to us that Esker understood how to work with faxes and how to interface with our archiving repository."

Other deciding factors were the comprehensiveness of Esker DeliveryWare capabilities and its ease of use. "None of the other options we looked at could do everything that Esker DeliveryWare can," said the project manager. "It gives us a platform to automate a whole range of processes, not just a fax-to-order solution. We know we can take advantage of Esker DeliveryWare in other areas like e-invoicing and accounts payable. We also like the way it presents data through the user interface, which was easier to use than the solution our CTI vendor offered."

Solution: Esker DeliveryWare

The company's business case for ROI was to automate fax orders from a portion of its large distributor customers, representing the majority of its fax orders. These orders are processed according to business rules. "Now the orders just flow through the system," said the project manager. "Very little has to be done to them — basically we just take a quick look to approve. So we were able to achieve our ROI target very easily."

> Esker DeliveryWare allows us to determine which orders need attention first, which results in better overall service to our customers as a whole.
>
> ▪ Business analyst

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▪ Project manager

In the company's automated fax-to-order process, faxes come into a server and the TIFF image is placed into a network folder. Esker DeliveryWare monitors the folder and retrieves orders files, capturing data and determining if a business rule applies to the order. If so, Esker DeliveryWare extracts the data and presents it in a validation form for CSR approval based on prioritization. After approval, the order is created in the SAP application and attached to the transaction, then sent to the warehouse for fulfillment. Esker DeliveryWare passes the original order image and metadata to the archiving system. When orders contain a credit card number, it is automatically redacted.

Benefits

Creating efficiencies in order processing and customer service to withstand new competition and protect market share, Esker DeliveryWare enabled the company to:

- Prioritize orders based on a strategic CRM criteria

- Reduce dispute resolution from days to minutes

- Cut costs associated with service level agreements

Esker DeliveryWare supports the company's efforts to be tactical in understanding how to manage its order pipeline.

Prioritization and visibility

Along with the ability to identify large orders that need to be processed before smaller ones, Esker DeliveryWare gives the company a readily accessible view into what type of orders they're receiving and what is in the queue at a given time. Managers can auto-generate reports on metrics such as how many orders come in on a certain day, who they're from, who processed them and what product they are for — long before the SAP application would be able to generate such reports. This visibility gives sales and supply chain managers ready access to planning and inventory information that can help with trending and forecasting.

Dispute resolution

In terms of business benefit value, improvement in dispute resolution is as significant as the removal of keystrokes from order entry. With order documents automatically stored and instantly available for reference, the company's CSRs are now able to respond more quickly and efficiently to customer inquiries.

If a customer reports an order problem that would delay payment of the invoice and inflate the company's DSO rate, the CSR no longer has to dig through paper files to find original documentation. Now he or she simply pulls up archived images online to identify the issue immediately.

Meeting SLA more efficiently and cost-effectively

Under the company's service level agreement, orders in by late morning must be out by early afternoon the same day. Esker DeliveryWare automation has reduced the cost of meeting this SLA, and the company is assured that orders get out on time. As orders come in from customers across the U.S., they are assigned a priority based on customer status, geography, product, distribution center it ships from, and other parameters built into the business rules.

Future plans

The company has several additional phases planned for its Esker DeliveryWare solution, including expansion of the fax-to-order automation to another division. Also part of the plan is electronic invoicing to lower costs associated with manual, paper-based billing. And going forward, the company will use Esker DeliveryWare reporting on metrics such as processing time per order to measure effectiveness of the solution and to evaluate CSR staff.