



# FROM CARBON PAPER TO WORLD CLASS BUSINESS PRACTICES BY LEVERAGING CRM TECHNOLOGY

## 2005 COMPUTERWORLD HONORS CASE STUDY

### BUSINESS

A MEDICAL EQUIPMENT FIELD SERVICE ORGANIZATION OF OVER 1,200 USERS PROVIDES IMMEDIATE INFORMATION AND SERVICES TO HEALTHCARE FACILITIES AROUND THE GLOBE. BY LEVERAGING NEW TECHNOLOGIES TO INNOVATIVELY DEPLOY AND DOCUMENT SERVICES, HELPING HEALTHCARE FACILITIES PROVIDE SAFE OUTCOMES WHILE MEETING FEDERAL AND LOCAL DOCUMENTATION REQUIREMENTS. [20055405]

*A Search for New Stories*



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### SUMMARY

A medical equipment field service organization of over 1,200 users must provide immediate information and services to Healthcare facilities around the globe. The service organization leverages new technologies to innovatively deploy and document services, ensuring Healthcare facilities provide safe outcomes while meeting federal and local documentation requirements.

### APPLICATION

STERIS Corporation is a leading provider of decontamination and sterilization equipment around the world primarily serving the Healthcare, Research, Pharmaceutical and University facilities. STERIS deploys over 1,000 global field service employees to repair and maintain decontamination equipment, sterilization equipment, operating room lights and operating room tables. Since the early 1970's the service organization has performed its role using carbon paper log books in the field, and then mailing the hardcopy information into offices to be input into homegrown technologies that enabled archiving and billing. These systems have inhibited the field personnel from easy access to vital information while they were in front of the customer and has limited the ability to achieve expected standards of excellent customer support. Also, the demands of the sophisticated markets STERIS serves dictate that that specific technician skill sets are dispatched efficiently, that STERIS technicians provide immediate technical information to answer customer concerns or questions, and that they document all work performed to meet regulatory requirements.

A comprehensive Customer Relationship Management System was proposed to replace several disparate systems and generate significant benefits. The realization of these objectives would allow STERIS to combine many separate pieces of information into a portable solution decreasing the wasted time and effort needed to secure customer information in the field. It would allow STERIS to appropriately dispatch, track, document and bill over 400,000 service calls per year. It would provide technicians with on site information that would tell them instantly whether equipment is covered under warranty or if it is under a Preventative Maintenance Agreement, and exactly what is, and is not, included in the customers agreement. It would enable the customer to verify all of this information upon completion of the repair while the technician is still on site. Once the customer and technician have reviewed the information, the customer would sign the service request on the technicians tablet PC. Then, upon completion of the call, the technician would sync the information to the corporate offices and the invoice would be generated immediately in most cases rather than weeks later, as was the case with previous manual systems. It would also give technicians a preview of expiring warranties and agreements that would allow technicians to convert expiring agreements to new agreements, faster than ever before. With the implementation of this technology service technicians would be better prepared with the proper information and parts before they arrive at the site. The account would be ensured that the appropriately trained technician would be there and that they will have full knowledge and record of the actual work performed.

However, well into the project it was discovered that the proposed benefits would require the leveraging of new technologies in ways not previously used to meet the needs of the technician, customer and the industry. Two essential requirements: Assigning and deploying technicians in a manner which ensures each account is assigned a primary, secondary and tertiary technician and; Capturing the customer's signature on the service request had not previously been achieved as part of a CRM solution.

Our ultimate solution provides a structure and technology that enables each account to have a primary technician assigned to them, provides the call center with visibility to the primary technician's availability, and in addition, when the primary technician is not available, each account has a secondary, and if needed, a tertiary technician which the dispatch center can assign to the call in order to ensure that the facility's

equipment is serviced as quickly and efficiently as possible. Upon completion of the call the technician is able to show the customer the completed service request along with all associated charges, launch a window in which the customer signs acknowledgement of services and the technician applies the signature to the service request for final customer verification of a completed and signed service request. The account can then choose whether they would like a hard copy of the service request, or whether they would like it faxed or e-mailed to them for storage. The e-mail option is a significant step forward for many customers due the massive amounts of documentation they must store to meet government standards. They can now store an electronic copy of the signed transaction without scanning or importing.

## **BENEFITS**

This project has absolutely, and fundamentally, changed the way our technicians do business and how our customers are served. Prior to the launch of this solution technicians service request tools were entirely manual. They wrote out service requests on multiple copy carbon paper forms, it was often unclear what parts and services a customer should be charged for, and what the rate for those associated items and tasks were. It often took weeks to generate the invoice, which may have included charges the customer didn't expect and could lead to concessions discounts, or damaged relationships. In a best case scenario the customer and the company were both left with stacks of carbon paper to organize and archive to meet regulatory requirements. Through the successful implementation of the solution our organization has seen technicians assigned in a hierarchal structure to accounts so that an account gets the best technician available in the quickest time possible. The technician has accurate current and historical information at his fingertips and is able to close the service request on site. The customer can then verify all charges and work performed, and chooses the mechanism by which they would like to be invoiced. Massive amounts of necessary paperwork and documentation have been reduced to data files that are easily transferred and stored for later access.

## **IMPORTANCE**

Leveraging technology to maximize the value of information is central to any CRM project, but even more so for this one due to the early gaps in being able to tie the customer signature to the service request and the gaps in being able to better serve customers by having a hierarchal technician structure assigned to their account. The innovative technician hierarchy and signature capture functions developed during this project are now standard functionality in Siebel CRM applications enabling the adoption of these tools throughout service provider industries and changing the way companies interact with customers. The hierarchy structure assures CRM users in other companies and industries that there is a logical mechanism for dispatching the most qualified technician available in the least time possible, and the signature capture functionality ties together the work performed, the specific charges, and the customer acknowledgement into an easily managed document that can be saved, filed, and retrieved as necessary.

## **ORIGINALITY**

The exceptional aspect of our project is inherent in the all encompassing solution it has provided our service organization, service technicians and customers, as well as in the innovative solutions developed at critical junctures. It involves:

- ? Elimination of Binders and catalogues that technicians needed for technical information, drawings and support
- ? Ready field access to all historical repair information associated with an account or a piece of equipment
- ? Easily verifiable information in regards to current warranty status and agreement status to ensure the proper charges are associated with each service call
- ? The ability to share information between field service, customer service and sales organizations.
- ? The consolidation of disparate systems and carbon paper based manual processes into a common technology solution
- ? The development of an innovative mechanism to tie customer signatures to service requests not previously accomplished in a CRM application
- ? The development of an industry groundbreaking solution to assign technicians to accounts in a primary, secondary, and tertiary structure not previously available in CRM applications.

The project ended up much as it was initially scoped. Even when it looked like functionality and benefits would have to be de-scoped due to application gaps, the vendor, partner and team worked to find solutions that would leave the scope and benefits in tact. Among medical equipment manufacturers, a solution this complete and successful is very rare.

## **SUCCESS**

As of this writing (February 21, 2005), the CRM Service application is in its sixth month of full deployment in North America. The European CRM Service application is on target to begin deployment in July 2005 and will be phased throughout the remainder of the year in seven countries. To date we have over 1,000 users enabled inclusive of field technicians, technical support representatives, customer service representatives and management. The organization is experiencing the benefits of having greater amounts of information readily available than ever before; we are more prepared for service calls with historical equipment information and accurate current agreement information; our business has better visibility to how much work is in progress, and the exact status of the work in progress; our customers are more often requesting information sent to them electronically to aid in the storing and access of the information. We are utilizing a tremendous tool to serve our customers faster, more efficiently, and more effectively than previously possible and we are beginning to see past our initial goals to benefits that will only be achieved because we have this platform in place. The organization as a whole has embraced the technology and worked through major start up pains to be able to take advantage of all this application has to offer.

## **DIFFICULTY**

At the onset, this project faced the obstacle of competing for funding with a major manufacturing initiative. This coupled with widespread press in the marketplace during 2002 – 2003 about the “Failure of CRM” placed it against significant obstacles to gain approved funding. The benefits of CRM were mostly seen as soft and loosely supported. It required months of dedication by a core team and diligent support at the executive level in order to refine the benefits so that every identified opportunity was concrete and quantifiable. Once approved, the obstacles outlined earlier in application gaps associated with technician hierarchy and signature capture took substantial effort and expertise to overcome. Solution after solution proved to be ineffective, but gradually and methodically the team eliminated what would not work to arrive at an acceptable solution that ultimately proved groundbreaking.

Upon deployment, difficulties were related to application bugs with the developed solutions, a longer than anticipated end user learning curve, and unforeseen consequences of application functionality. By far, the most difficult of these was the longer than anticipated learning curve. Our implementation touched virtually every piece of our service business and transformed the business at its most essential touch point – the technician to the customer. This does not take place without some pain and much effort around process improvement. The service business embraced the opportunity. We established a “Mission Control” for support calls, and set up field “SWAT teams” that could identify and address struggling users as well as make practical recommendations in regards to the application.