

Designing Processes to Access Data

Business Overview

Our client is a large fulfillment company (“TPS”). Their customers are Fortune 100 pharmaceutical companies who want to ship samples to doctors and other healthcare providers. These are high-value (and sometimes controlled) substances. TPS uses commercial 3rd party logistics companies to deliver the product.

TPS’s customers drive revenue for their products through several methods. One is by having their direct sales team call on prospects and offer to send samples. Another is to target on-line media, often provided by both TPS and other third parties. Another is to have TPS run a call center for prospects to call in. Those prospects then place “orders” that are then sent to TPS, who ships the product. Each of these channels has their own marketing efforts and costs.

Business Challenge

TPS wanted to integrate a newly-purchased competitor into their processes and operations. They were also very concerned with data integrity, as there were no closed loop processes in place within the acquired company’s systems and there was a high risk that the data being reported to their customers as inaccurate or incomplete. And finally, with multiple systems and processes, a given customer could receive different report formats and detail, often with little or no formatting (a data dump).

TPS’s clients wanted several business outcomes from TPS. Namely,

- They wanted TPS to ensure compliance with the laws related to the products
- They wanted TPS to provide enough data so it could be determined which marketing channels were effective and which were not
- They wanted to ensure that the 3PL’s not only shipped what TPS requested, but received provider acknowledgement and billed them appropriately
- They wanted TPS to provide the data (orders, shipments, etc.) accurately. Often in the previous environment, since it was disjointed and sometimes used as simple a mechanism as Excel, the data was inconsistent or incomplete.

Solution

TPS knew that they needed an integrated reporting and analysis environment to capture all of the data regardless of what system was used. They also wanted an environment that was scalable. They chose to engage LPA due to our business process skills, subject matter expertise and technical reporting capabilities.

LPA spent several weeks with TPS understanding the current processes and customer engagement methodology. Issues were identified around how TPS got firm customer requirements and inconsistencies between TPS's legacy and newly acquired businesses performed fulfillment were highlighted. LPA recommended process improvements enabling better line of site between the customer and what TPS was doing overall. There were also issues of capturing the data from each disparate and unique source systems completely and accurately. LPA recommended and built a data warehouse with well-controlled extracts from each source system with associated auditing steps put in place to ensure accurate and complete data loads.

The LPA team then tackled the reporting challenge. The solution was to build multiple analytical reports from the Data Warehouse that highlighted how each channel was doing both operationally and versus contracted service levels and results. In addition the solution introduced an ad hoc analysis capability that was previously non-existent that enabled TPS's clients to create new or one-time analyses in a self-service model. Finally, LPA introduced multi-dimensional analysis capabilities on top of the data warehouse using IBM Cognos to analyze orders and shipments. This comprehensive data warehouse and analysis solution allowed the TPS team, and the customer team to successfully address the desired business outcomes listed above.

Results

- With the analytic infrastructure in place, channel results, regardless of whether they were fulfilled by the legacy or newly acquired organizations, were integrated allowing inter- and intra- channel analyses to take place and service levels to be monitored.
- With the closed-loop process, from incoming orders to acknowledged shipments across all sources and fulfillment centers, and the ability to rapidly spot and address exceptions, complete and accurate data was ensured, allowing more detailed analytical reporting to be done with accuracy
- With an integrated Data Warehouse TPS was able to embark on systems consolidation and enhancement without impacting TPS's or their Customer's ability to obtain timely and accurate information
- With an integrated environment built on IBM Cognos, both TPS and the customer could build their own reports (including graphics, charts, and text) and do ad hoc analysis without engaging an IT department