



Customer Care Specialist Overhauls Procedure Management to Enhance Service

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Linda Schellenger, President, Telerox

Customer: Telerox

Customer Size: 1,700 employees

Country or Region: United States

Industry: Outsourced managed services

Partner: NextDocs

Customer Overview

Headquartered in Horsham, Pennsylvania, Telerox is a customer care provider with six North American locations. The company is a wholly owned subsidiary of Merck & Co. and specializes in multichannel contact centers, customer relationship management, and business processing services such as fulfillment. More than 90 percent of the company's clients are regulated by the U.S. Food and Drug Administration (FDA).

Business Results

- Competitive advantage highlighted by certification
- Ability to quickly add or change procedures
- Smarter decision making
- Easy-to-use solution for better client and customer service

Profiles

- President
- Vice President, Corporate Quality and Compliance
- Chief Technology Officer (Partner)

If you've ever called a customer service telephone number with a question or concern about a food, beverage, or drug, chances are good that you've been helped by a Telerox employee in one of the company's six contact centers in North America. More than 1,000 customer care representatives answer product-related questions on behalf of Telerox clients, most of which are companies in the consumer packaged goods, health-care and pharmaceuticals, durable goods, and retail industries. Telerox's parent company is pharmaceutical giant Merck & Co.

Customer care is extremely important to those companies because having a good reputation in the eyes of the public is critical. As a result, they closely evaluate potential providers' service quality and are likely to perform audits to see how a customer care provider such as Telerox has handled escalations, product recalls, and other key circumstances. In addition to undergoing scrutiny from prospective clients, Telerox must maintain the superior level of service that its existing clients expect.

Telerox employees need to deliver positive customer experiences regardless of the situation. Ensuring that each interaction—whether by phone, email, chat, or other channel—gives both Telerox clients and their customers the desired results requires attention to detail, follow-through, and a high degree of organization.

"Unlike those who manufacture products, our product is our people. Because we can't clone our most experienced contact center employees," laughs Linda Schellenger, President of Telerox, "we have to rely on established procedures to keep the service that we provide as consistent as humanly possible."

Procedure Management Headaches

In the past, the company's procedures were driven by its 40 different clients and their separate standard operating procedures (SOPs) and particular processes, turnaround times, and other requirements. Telerox also maintained its own procedures related to human resources (HR), finance, and contact center operations. "We started small, so paper-based information wasn't hard to manage initially," says Schellenger. "As we added clients, we added SOPs, but we had no centralized manner of dealing with them and managing paper-filled binders for each became untenable."

Telerox used to manage all these procedures either by storing them on various shared network drives or by printing them and keeping paper-filled binders around each contact center. The problem with both methods was that information was hard to find and even harder to trust. "Every time a change came up, we had to track down all the

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binders and replace the outdated documentation for a procedure or an underlying process with new pages, as well as locate and update the network drives,” says Schellenger. “Employees couldn’t be sure that they were following the latest instructions.”

Often, Telerox saw an opportunity to add value for individual clients by identifying and recommending specific procedures that had been highly successful for other clients. “With our individual ‘silo’ approach to procedure management, we had no way of applying the really positive elements of all the separate SOPs to every contact center so that all our clients could benefit,” says Schellenger.

The Push for Certified Excellence

Telerox determined that one of the best ways to improve the company’s handling of procedures was to standardize its operations. The company set a goal of achieving International Organization for Standardization (ISO) 9001:2008 certification for quality management, which would attest to the service provider’s abilities with regard to procedure handling. “When I joined the company in 2007, I identified ISO certification as a strategic area of opportunity for Telerox,” says Schellenger. “Meeting ISO requirements is critical to ensuring that we’re creating the internal efficiencies and effectiveness that help us keep costs down and quality up for our current and prospective clients.”

Telerox knew that it wasn’t enough to just review its procedure management; it wanted to abandon its primarily manual approach and put in place technology tools to support the proper documentation and handling of procedures. The company set out to find a solution that could help it centrally manage procedures, prepare for audits, and achieve ISO certification.

Because it has so many clients in the food and beverage and drug industries, Telerox sought a solution that complied with the Code of Federal Regulations (CFR) Title 21 Part 11 guidelines set by the U.S. Food and Drug Administration (FDA). This regulation defines the criteria under which electronic records and electronic signatures are considered trustworthy, reliable, and equivalent to paper records.

Perhaps most important, the solution needed to be easy to use. “We wanted to minimize the need for training our 1,700 geographically distributed employees,” says Barry Peters, Vice President of Corporate Quality and Compliance at Telerox. “Essentially, FDA compliance and ease of use ranked as our two most significant business requirements for a new solution.”

Building on an Existing Investment

After considering in-house development of a custom solution and several packaged solutions, Telerox chose to adopt NextDocs regulatory document and quality management software, which is based on Microsoft SharePoint technology. “Telerox had already invested in Microsoft Office SharePoint Server 2007 for our corporate intranet,” says Peters. “NextDocs came highly recommended from a colleague, and I was familiar with it as a best-of-breed product with a proven track record of meeting our industries’ requirements.”

Telerox selected NextDocs in September 2008 and worked closely with NextDocs consultants to deploy a solution in February 2009. By June 2009, the company had

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achieved ISO certification, confirming that Telerx had refined its documentation and procedures for quality assurance and continuous improvement.

Unified Access to Procedures

The NextDocs solution is embedded directly within the Telerx intranet interface. The solution gives employees throughout the company easy access to a unified information repository and the ability to conduct serial or parallel content reviews, electronically sign a document, and so on. Approximately 250 employees document, review, and approve procedures, while the remaining 1,450 read and use the materials.

Telerx has incorporated approximately 1,600 internal and client standard operating procedures into its solution. The information stored includes all the Telerx policies, procedures, and work instructions that new and existing employees may need, including human resources forms, training materials, and time-tracking processes.

Before, employees had to hunt down the appropriate IT, HR, or other staff member to get answers to questions about internal or client procedures. Now they can use the solution’s search engine to find the piece of information that they need within seconds—with results that they can trust. “Our centralized repository and automated workflow processes lower our risk of someone following the wrong procedure,” says Schellenger. “That’s important, particularly in case of an emergency, when we want every one of our employees to immediately know exactly what to do.”

Improved Level of Service

Rolling out the solution to all 1,700 employees in every contact center has had a profound effect on the company’s ability to handle changes in its clients’ procedures. This capability is especially critical for the industries that Telerx serves because, if clients ever have to recall a product, they want their contact center provider to instantly get the new information into the hands of the contact center workers so that they can share that vital information with customers right away. “The speed with which we can add or change a procedure and communicate that change to everyone who needs to know has gone from days, weeks, or even months to just minutes,” says Schellenger.

In the event of a recall in the past, Telerx relied on numerous phone calls, conference calls, and email messages to inform its workers of the urgent change related to a particular food or drug. “Rapid communication was a considerable challenge and that left us open to the possibility of error,” says Schellenger. “Adopting a solution that makes communication faster, easier, and more consistent helps us close the risk gap for our company and our clients.”

Extending Efficiency

Procedure management is only one challenge that Telerx is tackling successfully with its NextDocs and Office SharePoint Server 2007 tools. “We’ve been able to use the solution to create a lot of other process automation that supports our ongoing efforts to standardize and improve operations companywide,” says Peters. For example, Telerx has established an internal audit process for document life-cycle review, augmented its escalation process, and taken steps toward better IT infrastructure management using NextDocs change-control capabilities.

“Since putting our procedure management solution in place and achieving ISO certification, audits are almost a nonevent at Telerx because our processes are so much

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tighter and cleaner,” says Peters. “We now regularly conduct our own internal audits, so when we’re audited by the FDA or another outside organization, we’re better prepared.”

The company is pleased with the improvements that it has made and how use of its solution has led to increased employee efficiency. “We’ve reached a higher level of quality with our call handling, email handling, and other service aspects because we identified and incorporated the best procedures into the system for easy access and use by everyone,” says Peters. “We also use the solution to point contact center workers to the most up-to-date versions of each client’s scripts, online reference manuals, and other resources. We have no doubt that our employees are more productive now that they’re using this solution.”

Concludes Peters, “Telerx attained ISO certification just four months after deploying our solution, and we’ve made remarkable progress beyond that point with the procedures and underlying processes that we’ve been able to quickly and easily implement now that we have the technical framework in place. This solution serves as a tremendous enabler for us to accomplish a great deal in a short amount of time.”

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President Profile

Certification as a Competitive Advantage



Linda Schellenger
President
Telerx

With more than 20 years of professional achievements, Linda Schellenger has expertise in sales management, client services, operations, marketing, human resources, contract negotiation, and team building. As President of Telerx and a member of the board of directors, Schellenger oversees all functional areas of the company. Her primary responsibilities include strategic development, business planning, and client program consultation. Schellenger lives in Malvern, Pennsylvania, with her husband. The two of them enjoy spending time with their adult sons, golfing, hiking, and biking.

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Linda Schellenger places a high value on operational improvements and acquisition of International Organization for Standardization (ISO) certification. In fact, soon after her arrival at Telerx in 2008, she created the Corporate Quality and Compliance department to drive change throughout the company and address compliance in areas such as ISO standards, the Payment Card Industry (PCI) Data Security Standard, and the U.S. Health Insurance Portability and Accountability Act (HIPAA) of 1996.

"I knew that increasing our stature when it came to compliance and quality would help us cement relationships with sales prospects and contribute to building long-term strategic partnerships with all our clients," recalls Schellenger.

Setting Itself Apart

Schellenger considers her company's procedure management solution a key competitive differentiator and proof that Telerx takes its quality of service seriously. "Telerx is one of the first companies of its kind in the market to invest in this type of technology solution," says Schellenger. "Potential clients are wowed by our streamlined, optimized processes and underlying technology platform. The procedures that we've established throughout our company—and the technology tools and processes that help us manage and support those procedures—really set us apart from the competition."

Telerx credits its technology solution for much of the company's success in establishing trust. "Clients can engage in a Telerx relationship with added confidence because we have the means in place to know for certain that we're doing what we say we're doing. And we can prove it through internal audits," says Schellenger.

Choosing a Reliable Solution

Schellenger and other Telerx decision makers chose a solution from Microsoft and NextDocs in part because of the companies' excellent reputations and the credibility that

Telerx gains by basing its procedure management on technologies from Microsoft and its partner.

"Our procedure management solution is based on proven software from Microsoft and one of its Gold Certified Partners," says Schellenger. "That not only bolsters our confidence in the solution's reliability, but it also appeals to potential customers. They can rest assured that they aren't entrusting their customers' care to a company using a hodgepodge of little-known, little-tested technologies."

Perhaps the thing that pleases Schellenger most about her company's procedure management solution and resulting certification is that they now contribute to the overall Telerx mission of maximizing the care experience for its clients' customers. "Our procedures now reflect the high level of service that Telerx provides to our clients," concludes Schellenger.

Business Results

- *Competitive advantage:* Telerx can offer performance and accountability in terms of procedure management that make the company stand out from competitors.
- *Increased confidence:* The service provider relies on technologies from companies that it trusts and that engender trust in the eyes of its clients.

VP of Corporate Quality Profile

Putting New Procedures in Play—Fast



Barry Peters
Vice President of Corporate Quality and Compliance
Telerx

Barry Peters brings more than 30 years of experience in information technology, sales analytics, call center and customer satisfaction, quality assurance, and regulatory compliance to his role as Vice President (VP) of Corporate Quality and Compliance for Telerx. When he's not busy at work, Peters spends time riding his bicycle and drinking wine—but not at the same time. He has visited more than 70 countries and has built a portfolio of underwater photography to document his travels.

"My conservative estimate is that we now can review and approve new procedures and other documents 50 percent faster."

For Barry Peters, changing the way that employees handled tasks used to be an enormous hassle, requiring a significant effort to achieve consensus on a procedural change and garner approval from relevant stakeholders. And establishing brand-new procedures was even worse. "It used to be a major issue to collaborate on new procedures," recalls Peters. "It could take weeks to gather and combine reviewer input, and, because we were using email and shared files to work together, version control often became a problem."

Click-of-a-Button Approvals

Because of the company's paper-based approval processes, getting authorization to institute new procedures wasn't easy. Just routing a procedure for the proper signatures posed problems, especially when multiple approvers were scattered in as many as five geographic locations. But those headaches are a thing of the past. "Execution of new procedures and change management using NextDocs workflow processes represents one of the most positive aspects of our procedure management solution and certainly contributes to shorter procedure development cycles and reduced frustration for everyone," says Peters.

Today, after documenting a proposed new procedure, the author uses an automated workflow process to solicit input from appropriate subject matter experts throughout the company. Telerx used to combine its document review and approval processes, but following a recommendation from NextDocs consultants, Peters separated the two processes. Each Telerx document now undergoes a thorough vetting by the author's peers, after which the author automatically receives all feedback and revises the document accordingly.

The system then sends the proposed procedure on to the approval stage, where the author's manager and that manager's manager electronically sign it within NextDocs. "As a result of modifying and automating

our review and approval processes, we've dramatically increased the probability of a document's acceptance on the first try. In fact, we've seen only a handful of initial rejections out of hundreds of processes," says Peters. "My conservative estimate is that we now can review and approve new procedures and other documents 50 percent faster."

Added Value for Telerx and Its Clients

Peters believes that he has better awareness of all Telerx procedures and underlying processes because of the one-stop nature of the company's procedure management solution. "I feel like I have far greater visibility into what's happening in all our locations regarding process improvement," says Peters. "I get alerted to any changes and can use the solution to more quickly address issues and opportunities for improvement."

The visibility now available to Peters informs the decisions and proactive shifts in priorities that he might make in response to the trends that he can track. "We maintain strict client privacy, which historically made it hard to see the bigger picture," explains Peters. "By implementing this solution, we now have a holistic perspective and can identify issues, opportunities, and best practices among all standard operating procedures."

Business Results

- *Ability to quickly add or change procedures:* Telerx spends less time shuttling papers back and forth for approval, with a 50-percent reduction in procedure approval time.
- *Smarter decision making:* Peters has better business intelligence about what works and what doesn't companywide and can shift priorities accordingly.

Chief Technology Officer Profile

Building on Successful Technology to Help Customers Thrive



Matt Walz
Chief Technology Officer
NextDocs

Matt Walz, cofounder of NextDocs, is responsible for the company's day-to-day operations, including product development, information technology, consulting services, and customer support. Prior to NextDocs, Walz served as Director of Software and Services for DataLabs, where he led product development, consulting services, and customer support for the company's collaborative solutions business.

"[For the latest NextDocs software] we chose not to layer another user interface on top but rather to embed additional menu items right within Office SharePoint Server 2007 and SharePoint 2010, so customers can take advantage of their ease of use and our targeted functionality without forcing employees to learn and deal with one more interface."

The success that Telerx is enjoying with its procedure management solution comes as no surprise to Matt Walz. As Chief Technology Officer of NextDocs, he has witnessed a long line of companies make great strides in the optimization of their operations and achieve various types of compliance using NextDocs technologies.

Market Shift Spells Opportunity

In 2006, Walz noted a market trend: Companies were choosing to consolidate their information in a single solution and moving away from maintaining isolated systems. In addition, he noted that those companies often chose Microsoft Office SharePoint Server 2007 as the common platform.

"We determined that Office SharePoint Server 2007 was mature enough and had the technical capabilities that we needed to support a new NextDocs product line, including item-level security and a workflow engine built right in," says Walz. "The platform can do a lot. We decided to focus on just a slice of its capabilities—enterprise content management—and expand it to suit specific industry needs." NextDocs has since designed its product suite to work with both SharePoint Server 2007 and SharePoint Server 2010.

Building a solution on SharePoint technology has big advantages for customers when it comes to ease of use. "One of the biggest benefits of a solution made up of SharePoint technology and NextDocs software is that our customers' employees tend to already use Microsoft technologies. They're comfortable with our solution because they can use it within a familiar environment," says Walz.

"We chose not to layer another user interface on top but rather to embed additional menu items right within Office SharePoint Server 2007 and SharePoint 2010," he continues. "So customers can take advantage of their ease of use and our targeted

functionality without forcing employees to learn and deal with one more interface."

Easy Implementation, Sophisticated Support

Implementing the solution is straightforward as well. With the help of an on-site NextDocs project manager, Telerx installed the software in October 2008, completed initial configuration within a few weeks, conducted in-house validation and testing through January 2009, and put the solution into production the following month. "A speedy deployment was a definite requirement for Telerx because the company wanted to prove to its clients how seriously it took its improvement efforts," says Walz. "Using a platform with which Telerx was already familiar made for a faster, easier deployment."

Telerx now relies on its procedure management solution to provide the high level of support that the company needs for continuous operational improvement. "The value of NextDocs for Telerx is that it brings sophistication to the overall quality level of the organization," says Walz. "And the software adheres to the rigorous controls that Telerx needs in its industry."

Business Results

- *Ease of use:* Telerx employees can work within a familiar environment, which minimizes training requirements and fosters quick adoption.
- *Fast implementation:* The company was able to start using the solution—and take steps toward International Organization for Standardization (ISO) certification—quickly because of an easy deployment.

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