

## J&B Medical Supply Co.

### Automates Highly Complex Order Management Process



#### Business Challenge

This medical supplies distributor provides medical and surgical products to patients, caregivers, health systems, clinics and first responders. They were focused on continued growth, which also meant hiring more and more expensive customer service representatives (CSRs). There was simply too much work not to hire more people. But hiring, training, and retaining CSRs was very expensive and time-consuming, especially given their location and how complicated Life Sciences can be. These costs were stifling growth. Senior leadership felt that if they could automate more calls (or portions of them), sustainable growth and margins could continue.

J&B's core business is sending shipments of consumable medical supplies to their patients on a regular basis. Due to the importance of these consistent supply deliveries, many patients called frequently about them, to confirm, change, add to, or cancel their orders. Meanwhile, J&B is held to strict compliance standards that dictate how much of each product they can send to a particular patient. In addition, their orders are prescription-driven and require a number of additional authorizations to remain current, so if one of those requirements is not met, J&B will not ship – which ultimately triggers a call from the patient! Other times, a patient's recurring order may be set to ship in the future, but the patient needs the supplies sooner, so they call to push up the ship date.

**In other words, for this company and its customers, Order Status is far more important and complex than simple updates.** Callers were frustrated because checking on orders required significant effort from both them and the agents they spoke with. Self-service would provide speedier and more effortless order status calls and give agents more opportunities to handle high value activities.



#### Solution

Once patients authenticate using IVA® (view that solution), they are able to use a variety of self-service options developed by SmartAction, including Order Status. With integration to both J&B's and FedEx's database, the solution provides real-time detailed information about orders, including a general status or a line-by-line inventory of the order. Unlike most traditional IVRs whose best update is often, "In process," IVA® provides all of the same info that an agent would so fewer Order Status calls end up in the call center. IVA®'s advantage is that it can assess a patient's file and direct him/her immediately, when it may take an agent up to a few minutes to come to the same conclusion.



#### Success by the Numbers

- Of those that have orders, **88%** get up-to-date order status information from IVA®.
- For those that do not have orders, when prompted:
  - 10% reorder supplies.
  - 83% are missing a required document/authorization and are properly notified.
- Average Handle Time for order status has decreased to **just 30 seconds**, despite the many complex business rules associated with patient orders.

**Self-service provided speedier and more effortless order status calls, giving agents more opportunities to handle high value situations.**