



# IMPROVING ORDER MANAGEMENT EFFICIENCY AND BUSINESS SCALABILITY WITH CLOUD-BASED AUTOMATION

Terumo Medical Corporation processing customer orders 60% faster with Esker

## Challenge: Processing Fax Orders

Terumo Medical Corporation recently decided to market the medical device products it manufactures through its own sales teams rather than go through a distributor. After doing so, the company quickly realized it did not have the appropriate system or staffing in place to handle all of the incoming orders.

### Fighting the backlog

Many of Terumo's customer orders are sent and received via Electronic Data Interchange (EDI), but with a number of hospitals and clinics sending orders by fax or phone. Previously, the faxes would arrive in an email inbox as a PDF and have to be cleared every day which created a number of issues for Terumo's Customer Care team.

"We were getting swallowed up by everything," said Terri Calabrese, Director of Customer Care and Accounts Receivable at Terumo. "A lot of calls were being dropped due to all of the fax traffic. We didn't have enough resources to manage it properly; the order backlog was simply too much to get through."

## The Search for a New Solution

Terumo had several requirements for any new solution chosen as a replacement for its manual process. First, the solution needed to automate elements of the order management process like the EDI system using Optical Character Recognition (OCR) and other integrated recognition technologies. Additionally, to avoid any compatibility issues, the new solution needed to coexist with the company's existing ERP system (JD Edwards).



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Terri Calabrese — Director of Customer Care and Accounts Receivable

### Choosing Esker

The initial thought was to have Terumo's subsidiaries in India take over order processing, but the time and investment required to train staff members who weren't familiar with the customers or products was too great. Terumo also explored the idea of leveraging solutions already in place within different departments in the company, but these ultimately lacked the level of stability and number of key capabilities that Terumo was looking for.

The decision to go with Esker stemmed from the solution's advanced capabilities as well as a successful proof of concept (POC) demonstration, where Esker processed 100 sample orders for Terumo to show exactly how the solution would work.

"Esker's upside was too big to ignore — the functionality compared to the other products we had experience working with was night and day," said Calabrese. "We loved that it was an intelligent solution that could be taught rules to make it more customized to our specific requirements. Having the hosted option in the cloud was also a big plus for us. We no longer have to worry about maintaining our own infrastructure or wonder how we're going to get work done when the building is closed. Esker has really allowed us to be more versatile."

## Order Processing Automation

Using advanced automation functionalities and no predefined templates, Esker's solution takes the pain out of traditional order processing by removing virtually all manual touch points.

Esker automates the entire order management process – from reception of an order to its creation in the ERP system to electronic archiving – allowing companies to quickly process and track any order, regardless of format, with complete accuracy, visibility and efficiency.



### Support during implementation

Esker's adoption of the agile methodology for solution delivery allows for an altogether faster, more engaged, and fully customized experience for the customer – Terumo was no exception. "Considering the timeline we gave Esker, the implementation couldn't have gone any better," said Calabrese. "The Professional Services team gave us all the tools that we needed, and we were able to tweak the system along the way."

## Benefits

Terumo measures various aspects of its faxing process on a monthly basis (e.g., what faxes are being processed, average processing times, etc.). Since implementing Esker, the company has seen a number of measurable benefits, including:

- **Faster processing times.** The time to process an order decreased by 60% by keeping the workflow electronic with Esker compared to manually processing the orders through the ERP system.

- **Better scalability and service.** Even with the amount of inbound customer orders increasing year after year, workflow automation has allowed Terumo to maintain its current staffing levels while still freeing up time for its Customer Care team to focus on more customer-centric tasks.
- **Touchless processing.** Terumo recently began leveraging Esker's "touchless" process, having already taught rules for 575 different customer orders for which data entry is eliminated. Esker's Teach functionality is done quickly and easily by the business users, and helps drive more effective automation throughout the process.

Mrs. Calabrese isn't the only one in the company touting the benefits of Esker. Terumo's CFO, John Pinto, is impressed by how well the solution has been received by staff members. "We've pursued a number of new process improvement initiatives in recent years, but none have been as wholeheartedly accepted as Esker," said Mr. Pinto. "When I posed the rhetorical question, 'What would you do if I took Esker away?' everyone said they would be truly disappointed. It's wonderful to have that level of support behind a new product like this."

### Terumo Medical Corporations

For over 80 years, the name Terumo has been synonymous with high-quality, innovative medical devices. Starting as a manufacturer of clinical thermometers, Terumo Medical Corporation has grown into a worldwide leader in hollow-fiber technology, blood-management systems and endovascular therapy, with its medical products being used in more than 160 countries and generating over \$3 billion in global annual sales.

Today, Terumo develops, manufactures, exports, imports, markets, distributes and sells a diverse portfolio of medical devices, supplies and accessories, and generates \$280 million in annual sales. Terumo offers a wide range of products through its two business divisions: Terumo Interventional Systems and Terumo Medical Products.

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