

Process Optimization

The Challenge

This multi-billion-dollar manufacturing firm was experiencing unexpectedly rapid growth over the past couple of years. This precipitous expansion had led to numerous struggles and forced them to rely heavily on manual efforts to keep pace with demand.

Just before this growth spurt, the organization had rolled out a new mobile device platform that allowed sales representatives to draft and submit customer orders while on-site. The initial implementation of this platform was designed to use email for the submittal of orders to their existing order tracking tool.

Internal order processing teams needed to retrieve the orders from this tracking tool and then process them individually. These teams were responsible not only for accurate, manual data entry, but also for providing estimated delivery dates to the end customer. Once processed, they would manually enter the order details into their existing ERP system. As you could imagine, these order processing teams had become quite cumbersome and difficult to manage. It had also led to a significant number of incorrectly dated orders due to human error and outdated information about their capacity to deliver.

Following this manual process, other manual processes could begin. The first was to order the necessary parts and resources required to manufacture the given product. Supply chain analysts would use demand reports to evaluate their existing inventory and determine when they needed to replenish stock. This process was labor intensive and took a significant amount of time. It also resulted in numerous mistakes requiring additional work to correct and ensure that the appropriate stock arrived on time.

While supply chain analysts were placing material orders, transportation specialists were reviewing demand and delivery dates to begin scheduling the delivery of completed goods. The dates provided earlier in this process created various inconsistencies. A lack of completed assets to deliver on the original date provided to the customer meant customer service representatives were left to inform the customer of a delay. This regular struggle to accurately estimate delivery had reduced customer satisfaction, and in some cases, even led to canceled orders.



Once an order had made it through the manufacturing process and had been delivered to the customer, it was followed by an invoice. These invoices were complicated and made it difficult for customers to find specific orders and align them to the shipments they had received. This led to frequent customer inquiries asking for clarification on invoice details.

The Solution

Clientek engaged with the organization to evaluate these processes over a series of evaluation activities. Within each engagement we worked to identify all existing stakeholders and their definition of success. With that definition in mind, we then reviewed their existing processes and technologies to draft a current state.

Using this current state, we worked with the client's business and technology leaders to identify gaps and opportunities to improve their processes and technology to meet their predefined definition of success.

We drafted solution options to address each individual area of concern in a way that supported the overall process - ensuring that each solution supported one another. With the solution options drafted, we estimated the required effort and duration to implement them. Once the solution and approach were drafted and agreed upon, we began a series of execution engagements.

Our solution automated elements from each stage in the order process. The reception of orders, calculation of manufacturing capacity, allocation of the transportation resources, and re-ordering of supplies were all completely automated. We also automated the confirmation communication to the customer and provided accurately estimated delivery dates. Lastly, we updated their existing invoice process to provide their customers with a more organized and easier-to-use platform.

The Results

The client is now automatically receiving and dating 99% of all orders. The percentage of orders requiring a date adjustment has dropped from 35% to less than 5%. The invoices sent to customers are now clear and accurate and have reduced invoice queries by over 50%.

This solution has allowed our client to re-deploy their order processors, supply chain analysts, customer service representatives, and transportation specialists into higher value producing functions. Along with improved internal efficiencies, our solution has significantly increased customer satisfaction.

This engagement has resulted in Clientek becoming a trusted technology partner for our client and has given us the opportunity to participate in even more proactive improvement projects to continue making them more effective.