



AmerisourceBergen, delivering healthcare solutions worldwide.

Fortune 500 company achieves return on investment in less than a year using Adobe Sign to streamline product returns.



"By combining Salesforce, Conga Composer, and Adobe Sign, a process that previously took weeks or even months can now be completed in just three days."

Greg Glaser, Director of Salesforce.com Platform Deliveries, AmerisourceBergen

SOLUTION

Adobe Document Cloud
• Adobe Sign

Salesforce CRM
Conga Composer

RESULTS



REDUCED RISK

Automated information capture from multiple systems and improved accuracy of customer and product details on forms



FAST SIGNATURES

Shortened signature turnaround time on product return authorizations from up to two months to three days



EXCELLENT ROI

One division achieved ROI of less than 10 months due to faster processing of returned products



AUTOMATED WORKFLOW

Automated agreement and application workflows with Conga and Adobe Sign, enabling representatives to manage documents directly through Salesforce

AmerisourceBergen

Established in 2001

Employees: 16,000 worldwide

Chesterbrook, Pennsylvania

www.amerisourcebergen.com

CHALLENGES

- Consolidate and simplify processes for faster product returns
- Automate workflow by integrating the electronic signature solution with Salesforce
- Increase opportunity for revenue through sales of returned product

Shaping healthcare delivery

Access to critical medications can dramatically improve patient outcomes and save lives. AmerisourceBergen helps hospitals, pharmacies, and ultimately patients get the medications they need through efficient, global supply chains that improve access to pharmaceuticals.

AmerisourceBergen was formed in 2001 following the merger of AmeriSource Health Corporation and Bergen Brunswig Corporation, companies that served similar markets over different geographies. By combining the expertise and industry reach at each company, AmerisourceBergen became one of world's leading pharmaceutical sourcing and distribution companies, ranking 16th on the 2015 Fortune 500 list.

Accelerating customer returns

Customer care representatives at the AmerisourceBergen call centers work directly with hospitals, clinics, and pharmacies to not only take pharmaceutical orders, but to also process returns. "If our customers have reason to return a certain drug, we want to make it easy for them to return medications," says Greg Glaser, Director of Salesforce.com Platform Deliveries at AmerisourceBergen. "The faster we can receive a resaleable product into our inventory, the greater opportunity we have to recoup revenue and eliminate waste."

AmerisourceBergen puts all returns through extensive, internal quality control checks because it's important to know whether returned medications were handled and stored properly. For example, some drugs must be kept refrigerated, while others must be stored at ambient temperatures.

Before initiating any return, call center representatives draft a return agreement for a customer to sign that confirms the products being returned and certifies that they were handled correctly. AmerisourceBergen was using Salesforce to manage most information about customers, but specifics about returns were handled within a separate enterprise resource planning (ERP) platform. As a result, representatives moved between the two applications, copying information from one record to another. After printing the return agreement and faxing it to customers, representatives had to wait for the agreement to be signed and faxed back.

Because the returns process could not proceed without a signature, delays were common as representatives waited for signed agreements to be returned. Faxed agreements would often get shuffled around the hospital, clinic, or pharmacy before landing on the desk of an authorized signatory. In worst case scenarios where faxes were accidentally thrown out or sent to a wrong number, AmerisourceBergen representatives might wait up to two months to finish processing the return.



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Greg Glaser, Director of Salesforce.com Platform Deliveries, AmerisourceBergen

“Call center representatives were spending a lot of time drafting and managing return agreements. Our customers also found the agreements challenging to manage,” says Glaser. “We wanted to improve management of agreements and speed up turnaround—both to serve our customers faster and to lessen the load on representatives.”

AmerisourceBergen embarked on an initiative to accelerate returns by using automation to complete the entire process through the Salesforce Service Cloud. “One of the biggest impediments to fast turnaround was getting a wet signature on the return agreement, since it was the one step completely out of our control,” says Glaser. “We decided to look at electronic signature solutions to alleviate these issues. Adobe Sign was a logical choice due to compatibility with Salesforce and Conga Composer.”

Automating return workflows

Call center representatives now execute and manage return merchandise authorization (RMA) forms directly through Salesforce. Conga Composer extracts relevant information from multiple Salesforce records, including account and contact information from customer records and special product handling requirements pulled from the product database. Return forms are sent directly to a customer contact’s email. Customers can simply click on the included link to review and sign the file from any device. As a result, documents can be signed and returned much faster.

“By combining Salesforce, Conga Composer, and Adobe Sign, a process that previously took weeks or even months can now be completed in just three days,” says Glaser. “Representatives never need to leave the Salesforce interface, resulting in far less training for new call center representatives just coming on board.”

Automation continues beyond obtaining signatures for the returns. Once the return agreement is signed through Adobe Sign, a digital copy is automatically uploaded to the customer record in the Salesforce system at AmerisourceBergen. This, in turn, triggers further steps to complete the return, including sending information to the ERP platform, requesting RMA numbers, and emailing shipping labels to the customer.

Previously, a backlog of hundreds of returns were pending due to the wait for returned RMA forms via wet signatures. Through the increased automation, call centers are now equipped to still process 40 returns per day, but are also able to eliminate the backlog of returns caused by the previous return method.”

“Getting agreements delivered, signed, and returned quickly is not only important from a customer service perspective, but it also gives us more opportunity to resell returned products,” says Glaser. “One of our divisions, ASD Healthcare, was able to achieve a return on investment in less than 10 months through greater internal efficiencies and greater resales of secure, quality-controlled returns.”

SOLUTION AT A GLANCE

- Adobe Document Cloud
 - Adobe Sign
- Salesforce CRM
- Conga Composer

The new workflow using Salesforce, Conga Composer, and Adobe Sign also improves accuracy and auditability, reducing risk for AmerisourceBergen. Since Conga Composer pulls information directly from customer and product databases, there is far less chance of errors on the agreement caused by mistyped information. In addition, automated delivery of agreements based on current customer information in systems helps ensure agreements are not sent to the wrong people.

“The audit trail within Adobe Sign provides us with valuable insight,” says Glaser. “We can go back at any time to see where the chain of custody changed for an agreement and when it was signed.”

Company-wide efficiencies

After demonstrating success through RMA processes, use of Adobe Sign has expanded to bring efficiencies to other processes, such as hardware, software, and licensing procurement for the sourcing team. The internal signatures required to approve purchase orders could take weeks internally while papers were routed to another office or left sitting on the desk of a busy signatory.

“Adobe Sign reduces the hassle for my team and signatories alike,” says Glaser. “If I need to procure new hardware, for example, the sourcing team can execute the entire purchase order, up to five signatures, in about two days.”

Sales representatives are also using Adobe Sign to capture signatures and information required on sales partnership contracts. Before starting work with AmerisourceBergen, pharmacies, hospitals, or practices would submit an application that could be up to 20 pages long. Using Adobe Sign, representatives can capture information from an online application form instead of dealing with a hand-written faxed form.

Sending forms electronically rather than by fax saves paper, improves legibility, and reduces the need to manually enter information into Salesforce. As a result, the sourcing team can improve processing speed and accuracy.

AmerisourceBergen is looking to expand the use of Adobe Sign, an Adobe Document Cloud solution, to more teams across the company, including locations in 55 countries. “The automation gained by combining Salesforce, Conga Composer, and Adobe Sign has helped us increase revenue, deliver faster customer service, and reduce risk from human error,” says Glaser. “We look forward to experiencing these benefits in other applications across the company.”

For more information
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