



effectively

Manage Your Documents Effectively 24/7 with Web Based Technology



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Organization

Health Care Provider

This Arizona based organization provides resources for health care through clinics located across the state. They currently have more than twenty facilities which are staffed with dedicated professionals who provide health services. Their greatest need is to provide accurate information that allows patients and families to make informed decisions about their healthcare.

Challenge

In early 2007 this healthcare organization merged two regional organizations into a state-wide healthcare system. During integration, they realized they faced several significant communication issues. These issues included:

- › A lack of consistency in medical forms used in each of the field clinics
- › A lack of compliance to both organizational standards and governmental regulations relating to these forms
- › Issues related to version control and branding
- › A significant payroll investment in ordering and managing documents
- › A need to create a decentralized ordering system that would still maintain all standards of the printed material
- › A need to decrease time from order to fulfillment and delivery

During the initial engagement an in-depth needs analysis was conducted to address administration, accounting, fulfillment, and marketing functions. Four key objectives were identified that would increase effectiveness.

- › **Objective 1**
Create a system that would maintain the brand integrity and ensure compliance of all forms used in the field clinics.
- › **Objective 2**
Create a system that would significantly reduce the number of labor hours needed to manage the form ordering process and fulfillment. It was requested that this be done on a decentralized basis.
- › **Objective 3**
Create a system that ensured a minimum amount of document obsolescence by ordering on a just-in-time system rather than a just-in-case system. This process also had to have a solid version control component.
- › **Objective 4**
Create a system that would allow billing by cost center and give real-time visibility to usage level and form velocity.

Process

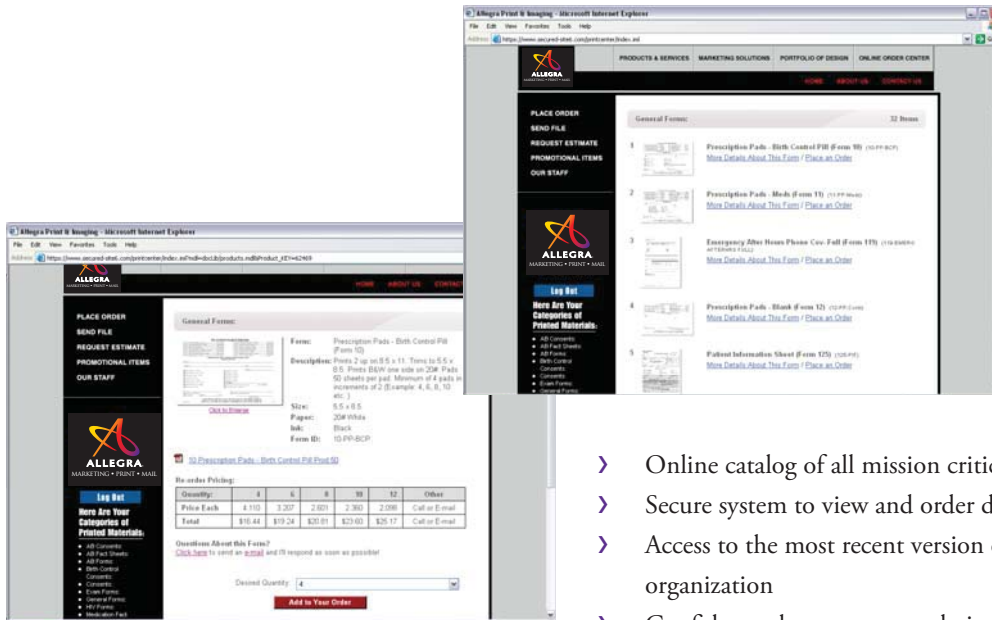
After the initial planning, it was clear that a number of key stakeholders/internal customers had issues that needed to be addressed. In an effort to better understand the specific needs of each group of stakeholders, an in-depth needs analysis was conducted. This was a three step process. The first phase was a document inventory to identify all communication documents used by field clinics. Allegra worked with the client to ensure

that we had accurate usage volumes on each form. We also collaboratively ensured that each form had a document control number and revision date. The second phase was a survey of all center administrators who ordered and used the forms on a daily basis. The final step was to meet with administrators to clearly understand the requirements for billing and compliance.



The web-based solution was developed and deployed as a simple point and click system that allowed users to view documents, add items to their shopping cart, view order history and select shipping locations. This was accomplished in a custom branded, confidential and secure environment available exclusively from Allegra.

The cornerstone of this online document management system is the Allegra Online Order Center.



- › Online catalog of all mission critical documents
- › Secure system to view and order documents
- › Access to the most recent version of forms to the entire field organization
- › Confidence that users are ordering the correct documents

Final cost savings will take a full fiscal year to compile, but initial feedback has been positive. By having a central repository for all documents the organization now has a high degree of brand consistency throughout the entire state. This is important from both a branding perspective, and more importantly on a compliance level.

- › Estimated savings of 500 labor hours
- › Reduced document obsolescence by 15%
- › Expected savings of \$80,000

Soft cost savings are perhaps the most significant impact. The new automated solution is projected to save 500 labor hours over the course of the agreement. In addition, by creating an on-demand model it is expected to reduce document obsolescence cost by 15%. The expected savings is estimated at \$80,000 over the term of this agreement.

“Ordering documents online is easy and I feel satisfied to receive the forms in an efficient manner, which reduces waste. Everyone I have spoken with has been very helpful to work with.”

Clinic Administrator



Challenge	Solution	Results
<ul style="list-style-type: none"> > Increase version control > Maintain brand consistency > Unify communications among clinic administrators > Reduce labor costs of ordering multiple documents 	<ul style="list-style-type: none"> > Create a custom branded, secure online catalog of all mission critical documents > Update online catalog with most recent document versions allowing users from all clinics immediate access to the most up-to-date material > Needs analysis to identify document life cycles 	<ul style="list-style-type: none"> > Increased brand and compliance consistency > Estimated savings of more than 500 labor hours > Reduction of document obsolescence by 15% > Expected savings of \$80,000 > 24/7 access to all documents



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We care. We listen. We deliver.

Innovation drives results at Allegra. For more than 25 years we have grown our portfolio of services because we care about your success.

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