

# Problem, solved.

## Modern Office Methods

Mobile sales leads, online expense management, and cloud-based credit applications create efficiencies for photocopier firm.

“The pre-fabricated connectors of Fujitsu RunMyProcess make building new cloud solutions very easy. That gets people thinking outside of the box about how maybe there’s an alternative to just creating another paper-based form. It’s an innovative platform.”

– **Dave Bandy, senior IT development manager, Modern Office Methods**

**RunMyProcess.**

a Fujitsu company

# Background

Founded in 1957, Modern Office Methods (MOM) is a family-owned company of 250 employees, providing office copier sales and servicing for Canon, Samsung, Ricoh, and HP. Based in Cincinnati, Ohio, U.S, MOM has branch offices in Dayton and Columbus. It serves its clientele with approximately 50 field technicians and a 60-person mobile sales force.

In 2009, MOM made the decision to migrate its operations to the cloud. The company wanted to reduce hardware and administration hardware IT costs and become more flexible in software deployment. This meant replacing email with Gmail, as well as adopting Google Apps (Docs, Sheets, and Slides) and Salesforce.com. These had to integrate with MOM's ERP system (eAutomate from Digital Gateway), and a Microsoft SQL Server database, both situated behind their firewall.

"The office equipment market is very competitive, so there's constant downward pressure on equipment prices and services margins," said Dave Bandy, senior IT development manager at MOM, who led the migration.

"As a result, we're constantly looking for ways to run our business more efficiently, from our back-office operations to field sales and service."

MOM also wanted to discard time consuming, error-prone and manual business processes – such as updating information through waves of email attachments. Dave Bandy went on a quest for something that offered cloud-based, pre-built application connectors. He came across Fujitsu RunMyProcess through partner White Stratus and was impressed with the minimal coding required.

## Problem – sales lead tracker

There were three areas of MOM's business that Dave Bandy wanted Fujitsu RunMyProcess to improve: sales leads, expense management, and lease credit applications.

His aim was to build a solution where the Fujitsu RunMyProcess contribution was visible, to demonstrate it to managers and gain their support for rolling it out more widely across the organization. Dave Bandy decided that a sales lead tracker would be "low-hanging fruit" – something that could be easily solved, offer an attractive and easy-to-use Fujitsu RunMyProcess interface, and show a measurable gain. So that was first on the agenda.

MOM's service technicians visit their clients regularly, so they're often the first to hear about a sales opportunity. For example, an office manager may let slip while chatting that her company is planning to replace their old fax machines with new multi-service scanners or copiers. That's why MOM has long had a policy of rewarding technicians for any tips that lead to sales.

The problem was that up until that point, the sales and service departments had operated separately. So the service technicians rarely even knew the name of their customer's sales account manager, or vice versa. The process of passing on leads was haphazard and manual – a matter of emails or paper forms.

If the service department didn't know who their sales representative was for a company, they'd fill out a form and leave it with MOM's marketing coordinator, who had to look up the appropriate sales reps and dispatch the tips "like a traffic cop." This took up at least an hour of her time each week. And inevitably, some tips fell through the cracks.

Even if the tips did reach their destination, the technicians had little visibility into whether they had led to sales and qualified them for the reward. So with low odds of compensation for a tedious process, they weren't sending in many tips.

## **Solution – sales lead tracker**

In response to this problem, Fujitsu RunMyProcess were tasked with building a tip app. Within several weeks, Dave Bandy and White Stratus had created easy-to-use, personalized dashboards on the Fujitsu RunMyProcess platform for each service tech, showing all of their leads and their current status. The lightweight web interface can be accessed through the techs' mobile devices.

Dave Bandy explained that one powerful advantage of the Fujitsu RunMyProcess platform was its drag-and-drop process diagrams that outline workflows in visually appealing charts: "People can see and relate to that," he said.

The app looks up customer account information in MOM's ERP system behind the firewall, finds the correct sales rep, creates a to-do task in the rep's Salesforce account, generates an alert, and adds an entry to a Google spreadsheet, to track all of the tip leads.

## **Benefits – sales lead tracker**

Because the new application is easier to use, MOM have seen a rise in the number of sales tips coming through. "Now that they're getting real-time feedback on their tip status, the number of leads keeps going up," Dave Bandy said.

Before, MOM couldn't even measure the success rate: "Nobody kept count since that would be another manual task

they'd have to do. Since the new solution is 100% automated, it automatically tracks statistics such as leads-to-sales conversion." he added.

The new application also has an intangible benefit – getting the sales and service departments to better coordinate their efforts. Many service techs are acting as customer service ambassadors now; if they're at a customer site and detect dissatisfaction, they can easily alert the sales rep to address it proactively.

The results of the project impressed the MOM executives, who gave the green light to Dave Bandy to explore how Fujitsu RunMyProcess could be used for other areas of business, too.

"The Fujitsu RunMyProcess platform is still an IT tool – you have to know how to program to use it – but for our technical staff, the pre-fabricated connectors make building new cloud solutions very easy," Dave Bandy said.

"That gets people thinking outside of the box about how maybe there's an alternative to just creating another paper-based form...it's an innovative platform."

## **Problem – expense management system**

Next up for improvement was MOM's expense management system. Their service technicians drive hundreds of miles a week to fulfil customer calls. They are reimbursed motorist costs such as gas, bridge tolls, and parking, which is paid back to them at the end of every two week pay period.

The cost of the expenses ranges from \$50 – \$500 per service technician – only a fraction of their pay check, but the most paperwork-intensive part. Previously, the field techs had to save all of their receipts and either photocopy them or staple them to a sheet of paper. Then they'd submit them for approval at the close of each pay period in paper form or by email to their managers, who would then forward them to the accounting department.

The accountants would sort all the requests, type the amounts, purposes, and recipients into eAutomate (the company's back-end financial system), print out and review the requests, code them for general ledger entry, and then issue reimbursement checks. This process took nearly a full workday for one accountant in every two-week pay period – and for relatively small amounts of money.

To help relieve the paperwork burden and reduce administration costs, MOM decided the best solution was to move the process to the cloud.

## **Solution – expense management system**

With the help of White Stratus, Dave Bandy developed an easy-to-use Fujitsu RunMyProcess web-based form that

MOM's technicians can complete quickly. The new online reimbursement form automatically compiles receipts with all of their supporting information and lines up each request in a neat queue for review, approval, exporting into eAutomate, and check printing.

It automatically calculates the reimbursement rates, based on monthly government gas price surveys and whether employees used their own vehicles or company vans. Technicians can take pictures of their receipts with their smartphones, which the Fujitsu RunMyProcess solution uploads and attaches to the reimbursement form.

## **Benefits – expense management system**

There's now no need for technicians to waste valuable time trying to process their expenses with photocopies, tape, and staples – or even manually attaching a file to an email. It also means technicians don't have to drive back to the office to drop off their forms, which used to waste both time and gas. Now that the expense reports and approvals all happen in the cloud, there is no need to chase approvals or receipts, no calculation discrepancies, and no need for manual data entry.

## **Problem – credit application process**

MOM was also too wedded to time consuming, error-prone, manual business processes such as updating information, by way of waves of email attachments. The management team hoped a new technology platform would help them move beyond that, without requiring months of coding to get there.

"The first application I really needed to solve was arranging funding for customers to lease copiers and other expensive machines," David Bandy recalled.

"Before we adopted Salesforce, the lease credit process was very manual – it was primarily paper-based. Our sales reps had to physically fill out a lot of forms on behalf of the customer."

These forms would then be photocopied or scanned, before being emailed or faxed to the U.S. Bank, which would print them out again and hand the hard copies to staff to manually type into their internal applications. This process was time-consuming and open to errors at every step.

Around the same time, the U.S. Bank developed a web-based application for accepting lease credit applications. In order for MOM to use it, they had to send the lease credit request data in an electronic format that the bank's computer system could accept. Dave Bandy saw this as the perfect opportunity to build a new, cloud-based workflow to streamline MOM's lease credit process.

A traditional solution would have been to hand-code an application to process the lease credit forms. But building all those point-to-point connections between Salesforce, Google Apps, and the U.S. Bank would have taken months to code, plus even longer to de-bug.

## **Solution – credit application process**

The pilot project of automating customers' leasing credit applications took only three weeks to develop and dramatically simplified the process. "Once I saw what Fujitsu RunMyProcess could do, I started to look for other problems internally that I could go after," remembered Dave Bandy.

The lease credit app "was a very quick turnaround," he said, built by him and Fujitsu RunMyProcess partner White Stratus, in just three weeks.

The solution is triggered when the MOM sales rep fills out a customer's credit request in Salesforce. The solution logs into U.S. Bank's web service, opens a credit application, populates it with the customer's Salesforce data, time stamps when the application was submitted, and logs out of the bank's service.

## **Benefits – credit application process**

When the Fujitsu RunMyProcess solution went live, at the start of 2013, it considerably streamlined MOM's operations. "Getting a credit application submitted and returned used to take several hours, sometimes overnight. Now it's only 5-10 minutes," Dave said.

"The sales reps find it very easy to use – you just click a button."

The faster credit application process reduces the time it takes a sales rep to close a deal and submit the customer's equipment order. If the customer's credit application is denied, the MOM rep can react more quickly to save the deal – for example, by offering reconditioned office machines that don't require financing. And in the time they no longer spend shepherding lease credit applications, MOM's 60 sales reps can call more prospects, draw up sales proposals, check up on the competition, and otherwise expand their sales funnel.

The Fujitsu RunMyProcess solution also sped up operations and cut operating costs for MOM's partner U.S. Bank. "Before, they had to manually key in the lease credit operation data; now, it's completely automated," David Bandy pointed out.

"Considering that they process thousands of lease applications for us, their labor savings are substantial. Plus, there's zero chance of clerical error."

Pleased with the outcome, MOM is creating a similar lease processing solution with another partner bank.