



IDT

putting paper in its *place*

Manufacturing

Staying Responsive to Customers: Document Management System a "Service Staple" at Greenlee Textron



GREENLEE®

Change is a constant challenge for any business. But in the new economy, change has ushered in a greater customer demand for more personal service.

"Today, we want the companies we purchase from to tell us about our order, not the other way around," says Mary Lewis, e-Business Director at Greenlee Textron, Rockford, Ill.

How does a large company handling thousands of orders daily keep pace, tracking and delivering goods, all the while keeping customers informed?

Lewis should know. The last decade of Greenlee Textron's 130-year history is a study in successfully handling multiple changes in computing systems, and at the same time, enhancing service to customers. In her previous role as Director of Customer Support and Communication, Lewis spearheaded the company's efforts to streamline and automate all day-to-day interactions with customers, from purchase orders to shipping to invoicing, with an automated document management system that has evolved to keep pace with e-business.

Greenlee Textron produces tools for the woodworking industry, wire and cable installation systems for the electrical industry, and test, measurement and installation equipment for the data-signal-voice market. Today, its 8,000 distributors interface with more than 16 customer service reps, each handling 150-200 calls daily.

Several acquisitions since 1992, and itself acquired in 1995 by Textron Inc., Providence, RI, made it essential for Greenlee Textron to have one comprehensive means to manage documents and workflow. This internal need, coupled with the sheer volume of customer calls, made it even more important for customer service representatives to be able to answer distributor questions easily.

"People don't realize the power of these systems, and the positive impact they can have on your business."

- Mary Lewis
e-Business Director
Greenlee Textron

An Evolution in Customer Service

The company first took stock of its paper-intense systems in 1993, when it handled 600 orders daily on a Macintosh platform. It purchased a document management system to store and retrieve various transactions, such as purchase orders, invoices, bills of lading, shippers, etc. At the time, Greenlee Textron was receiving most orders via facsimile. The imaging system, provided and integrated into the mainframe by Integrated Document Technologies, Inc. (IDT), Itasca, Ill., a full-service consulting firm specializing in document management systems, allowed for

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the company's transactions to be scanned and archived for historical purposes. Use of the system soon expanded to other in-house documents.

Still, the company had many paper-based processes and forms that required handling. Faced with this and a switch in 1995 to a Windows operating platform required by its new parent, Greenlee Textron again turned to its document management consultant for a solution.

Drawing on software and hardware products from leading manufacturers and its own proprietary software, IDT's expertise in designing complete systems for manufacturing firms came into play when it sought a solution that could better control necessary paperwork, and at the same time, manage the platform change. Its team of consultants created an integrated IDM system combining RightFAX Enterprise software, an NT-based fax server solution from AVT Corporation, Kirkland, Wash., document capture software by Kofax Image Products, Irvine, Cal. and a high-volume production imaging, COLD and workflow solution from Optika Inc., Colorado Springs, Col., a leading provider of B2B web resolution software. After installing and integrating the system, IDT trained Greenlee Textron's staff. "The result was a solid infrastructure for reducing paper flow and making data more accessible," explains Paul Szemplinski, IDT President.

It was an infrastructure that would serve the company's future well. Among the first steps Greenlee Textron took toward web-enabling transactions with customers and suppliers was its participation in a pilot for an Internet software system, also by Optika. Through real-time interaction, facilitated business processes and delivery of various business-to-business content, Optika's Acorde™ solution permits companies like Greenlee to create a "Trading Partner Resolution Network" over the web, allowing business partners instantaneous, on-line access to transaction information while providing collaborative tools to facilitate resolution. Two components of this software family were implemented at Greenlee Textron: Acorde Context™ storage and retrieving of B2B transactions, and Acorde Process™, which provides workflow automation for process intensive environments such as order entry.

For Greenlee Textron, the software's capabilities were a perfect fit for two of its business-to-business e-commerce initiatives. "One, to get in tune with customers and two, to streamline internal processes and improve workflow," notes Lewis. "We're using the Acorde solution to support both priorities."

This latest web-based document management system now incorporates all operations within Greenlee Textron's customer service department: POs, packing slips, shipping information and customer correspondence. "It has made a definite improvement in terms of time and labor," says Lewis. "The automated system is much faster. Without the scanning capability and the means to bring all documents to a central location, staff would have to search manually. This way, there is no waiting. We can give our customers the answer now."

Melding Technologies

"Out with the old, in with the new" is not always feasible given the unrelenting cost and speed required to stay current with changing technology. Greenlee Textron found that it is possible

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to take advantage of the latest B2B software solutions by integrating new system elements with older components, allowing both to function as part of a larger, more efficient whole.

Recently, the company saw many potential gains in incorporating its Xerox document center into the Optika system. The ideal was to enable staff to drop documents into the center and have them automatically re-format into Acorde. To create this compatibility, IDT developed a suite of software products, called MagnumPOWER™, that serve as the bridge between the two systems; other functions provide system enhancements such as web-browser based document capture, document indexing and workflow automation.

This add-on software allows companies to customize their document management system, but more important, it leverages in-house technology versus purchasing an entire new scanning system – typically a necessity.

“It’s quite common that new and existing systems are not compatible as is,” says Szemplinski. Skillful integration – the creation of middleware between systems – rather than simply replacing components, offers companies the highest return on investment, he continues. “New techniques for imaging, workflow and COLD cannot be installed as islands. They must be integrated with the company’s current computing systems, or, the document management system will become a cost center.”

In Greenlee Textron’s case, the investment in the original system has been fully leveraged in today’s business operations: several components are still active and usable.

The document management system’s expansion and its visibility throughout the company has attracted attention outside of the customer service arena. Greenlee Textron’s accounting and engineering groups are among the newest users.

“The system plays critical role in our day-to-day operations,” says Lewis. “Every day, employees call to incorporate information. And every day, we are discovering new things that can be done.” For example, the system is being used to distribute instruction manuals to customers via e-mail, and, to fax direct fax from the PC, again saving Greenlee Textron staff precious time.

“People don’t realize the power of these systems, and the impact on your business,” she notes.

Upgrades for E-Commerce

As the company continues to makes progress with its e-business plans, further enhancements to the document management system are in the offing to streamline and speed procedures, including Optika’s new B2B web resolution software solution, Acorde Resolve™. Greenlee Textron recently completed a test of this software, which allows transaction discrepancies to be resolved via “virtual” meetings in which participants can jointly view, discuss and resolve problems over the web.

"This interactive capability is a value-added service. It shows customers that we are a partner – one that is taking proactive steps to give them personal service," says Lewis. "After it is implemented, we expect to see even greater improvement in our processes."

This latest software will also be integrated by IDT together with Optika's Solution Services organization. Szemplinski sees it as another of many expected advancements from Optika as it works to help companies maximize their use of the web among all trading partners, with innovations like real-time collaboration.

"Document management technologies, whether traditional hardware and software or web-based, are clearly significant to serving customers, working with suppliers, and creating efficiencies throughout an organization," says Szemplinski. "Any process that is repeatable can be automated. In the new economy, they *should* be automated."

For Lewis, the system is a direct link to exceeding customer expectations, day to day. "Customers don't have to wait for answers," she says. "Without having a complete document management system, you simply can't do it – especially as we all move toward a global economy."

"No one would expect to run a business without a general ledger. For us, the system is just as much a necessity. It's a staple of doing business."

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™ MagnumPOWER is a trademark of Integrated Document Technologies, Inc., Itasca, IL.

Integrated Document Technologies, Inc. (IDT) helps companies eliminate paper at its source, offering consulting services and a full line of document imaging and management products including hardware and software systems and Internet-based electronic solutions. Since 1992, IDT has put its sole focus on creating customized document management solutions for companies in diverse industries, serving as a one-stop resource for design, integration and long-term system support. With system installations throughout the Midwest, IDT's expertise as system designer and integrator continues to expand as new document management technologies become available.

Optika - Headquartered in Colorado Springs, Colorado, Optika Inc. (Nasdaq:OPTK) is a leading provider of B2B web resolution software. Optika's Acorde™ family of Internet software solutions allows companies and trading partners to more efficiently and cost-effectively identify, discuss and resolve business-to-business transaction issues. By enabling companies to establish web resolution hubs—virtual communities that provide secure access to relevant information and real-time exchange capabilities—the Acorde product family increases trading partner loyalty, reduces costs and improves trading partner efficiency. With more than 1800 customers worldwide, Optika drives business decisions for profitability in leading companies such as The Home Depot, Turner Broadcasting Systems, Siemens Communications, Southwest Airlines, Verizon Wireless and Clear Channel Communications. For more information about Optika and Acorde, contact the company at 719.548.9800 or visit www.optika.com.

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