



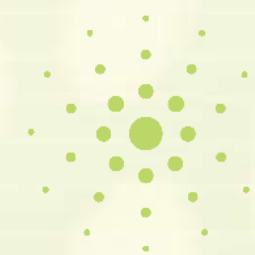
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Enhancing Profitability For Healthcare Distributors Series

What Happens Post Sale?



Nick Pericle
Managing Director, Distribution



ProfitOptics



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Enhancing Profitability for Healthcare Distributors (Pt 2 of 4)

What Happens Post Sale?

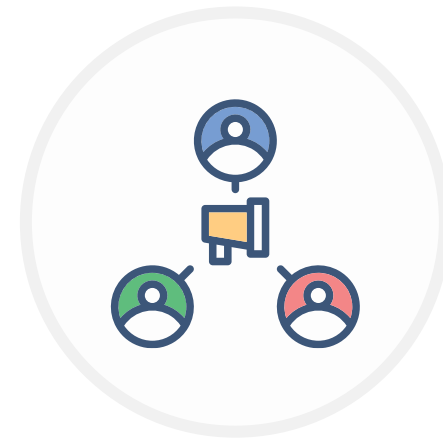
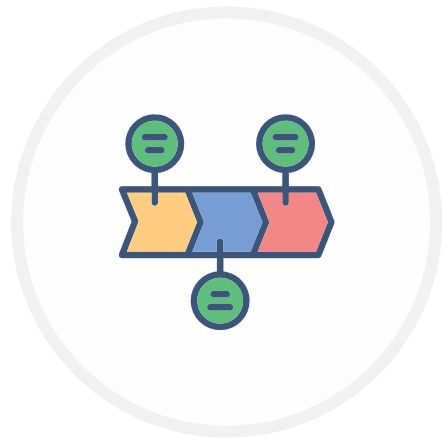
**Customer Service, Follow Ups,
Warranties & Returns, and Accounts Receivable**

Nick Pericle
Managing Director, Distribution
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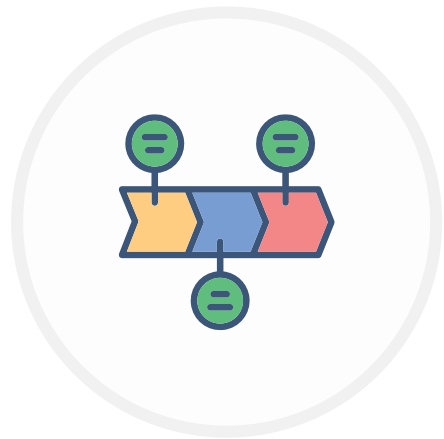
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The method used to determine the total expenses incurred by an organization to deliver products or services to its customers.



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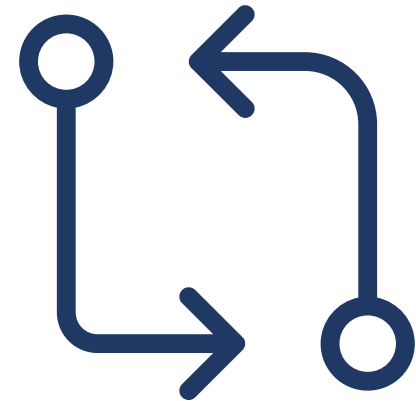


**What happens “post” sale
in Healthcare Distribution?**

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**Customer
Service
Support**



**Follow Up
&
Feedback**



**Warranties,
Returns**



**Billing,
Invoicing,
Accounts Receivable**

The sale is just the beginning. How we manage post-sale interactions defines our long-term profitability.

← Costs! →

Definitions

Cost Drivers

- Operational Costs: Expenses related to handling customer service, returns, and billing processes.
- Logistics Costs: Costs incurred in the transportation and management of returns.
- Administrative Costs: Costs for invoicing, follow-ups, and managing accounts receivable.
- Resource Costs: Labor and technology costs involved in managing these processes.

Drive Profitability

- Minimize Costs: Identify and reduce inefficiencies in post-sale processes.
- Enhance Efficiency: Streamline operations through automation and process optimization.
- Improve Customer Retention: Increase customer loyalty by providing excellent post-sale service.
- Leverage Technology: Utilize advanced tools and systems to reduce manual workload and enhance accuracy.
- Data-Driven Decisions: Use analytics to continuously monitor performance and make informed decisions.

People

Process

Technology



Customer Service Support

Cost Drivers

- High labor costs for training and maintaining customer service staff.
- Inefficient issue resolution processes leading to repeated contacts.
- Customer dissatisfaction resulting in churn and negative word-of-mouth.

Minimize Cost and Drive Profitability

- **Self-Service Options**: Implement self-service portals and FAQs to reduce the volume of inbound support requests.
- **AI and Automation**: Use AI-powered chatbots to handle routine inquiries and free up human agents for complex issues.
- **Skill-Based Routing**: Implement skill-based routing in call centers to ensure inquiries are handled by the most qualified agents, reducing resolution time.
- **Continuous Training**: Provide regular training to customer service teams to enhance their problem-solving skills and efficiency.

Customer service done right is not a cost center, but a profit center.



Customer Service Support Case Study

Background

- Medical Distributor
- 6 Customer Service Reps
- Shared Email Inbox
- ERP, CRM
- SOPs, FAQs
- Training
- Tribal Knowledge

Scenario

- Significant time on training
- “Swivel Chair Activity”
- Time spent retrieving and typing info
- Delays in customer communication
- Impartial information communicated
- Plans to hire more customer service



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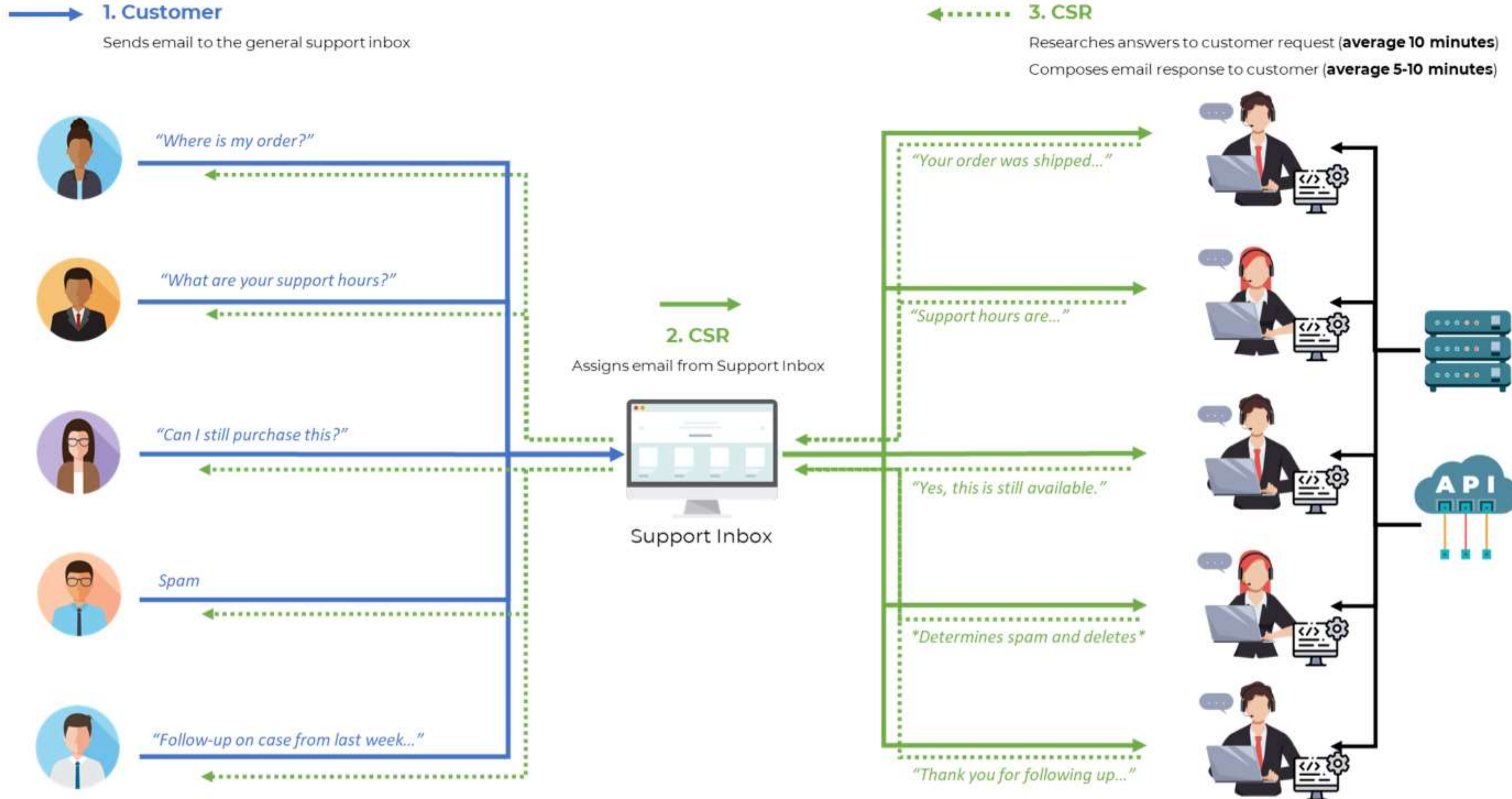
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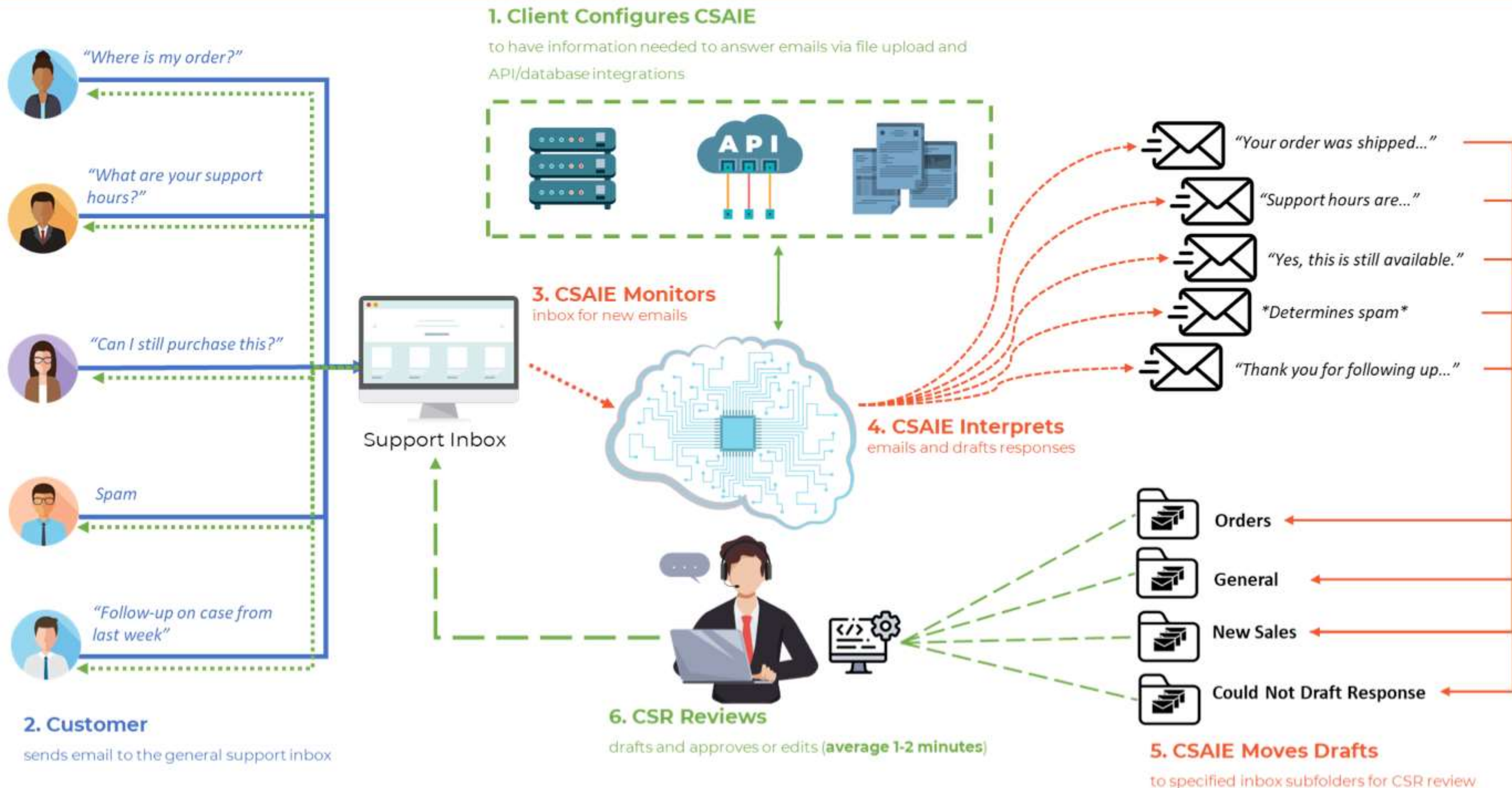
Process

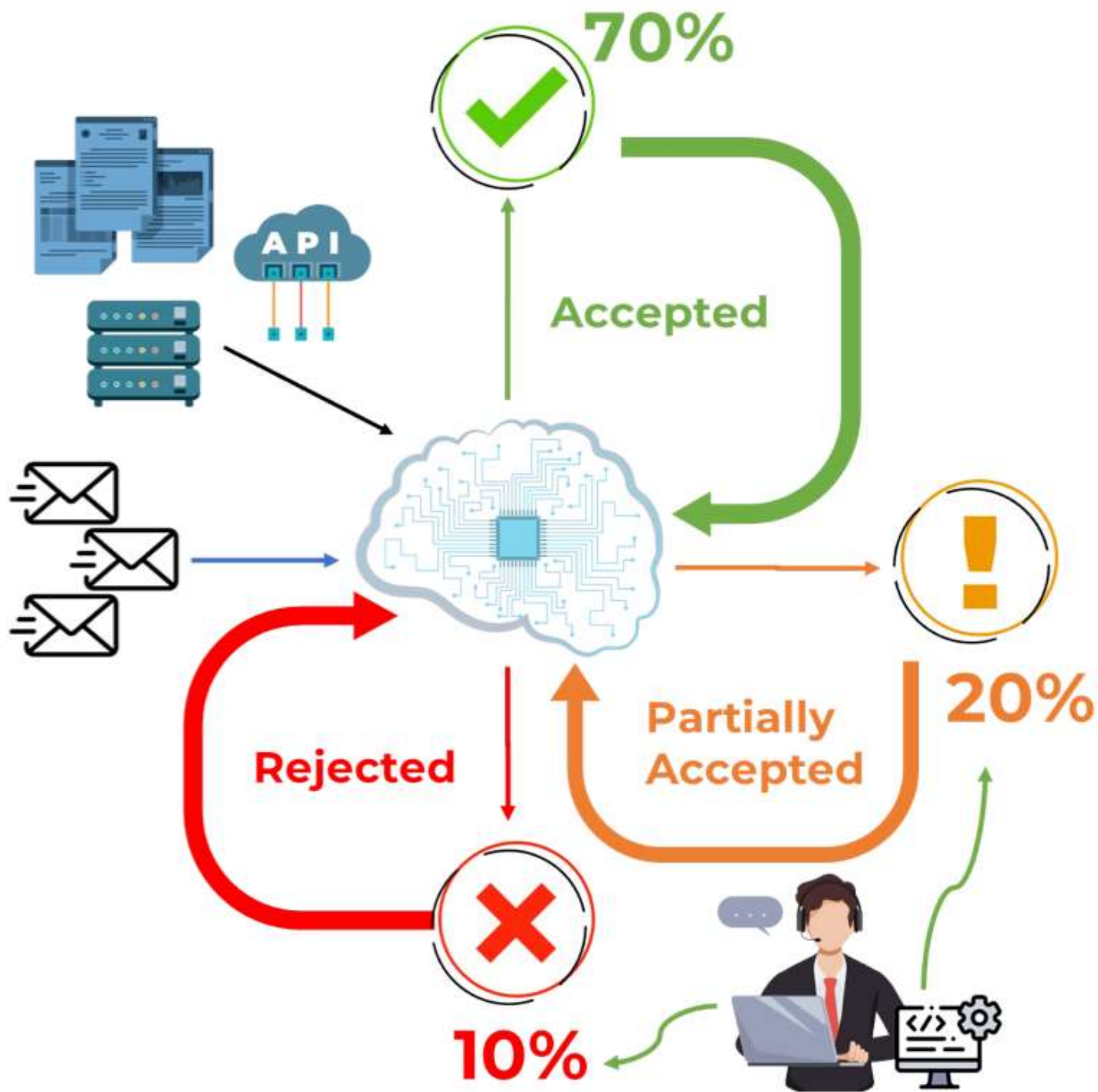
Technology

GENERAL SHARED INBOX CUSTOMER SUPPORT



CUSTOMER SERVICE AI ENGINE SUPPORT





- The **CSAIE** has the ability to learn from its mistakes.

- Answers are marked as "**Accepted**", "**Partially Accepted**", or "**Rejected**" based upon the CSR agent's interactions with the draft.

- Drafts sent without edit are marked **Accepted**, **Partially Accepted** drafts are marked as so, and drafts that are completely discarded or significantly rewritten are marked as **rejected**.

- This information is fed back to the platform from itself to learn and improve responses

- CSR** leadership can also review the non-Accepted answers in the **CSAIE** platform to find gaps in training data.

- For example, perhaps we notice questions about a specific department are not up-to-par and determine we forgot to upload that department's information to our assistant's source list.

Overall Approach to Customer Service Support to Profitability

People

Process

Technology

Baseline

Train

Tech

Optimization

Improve

- Begin by assessing the current processes and identifying key cost drivers.
- Set a baseline for performance metrics to measure improvements.

- Educate staff on the importance of each process and how it impacts profitability.
- Provide training on new tools, technologies, and best practices.

- Invest in automation tools, CRM systems, and data analytics platforms.
- Ensure seamless integration of these technologies into existing workflows.

- Streamline processes to reduce manual intervention and increase efficiency.
- Regularly review and update policies and procedures to reflect best practices.

- Establish a feedback loop to continuously collect data and identify areas for improvement.
- Regularly review performance metrics and adjust strategies as needed.



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Thank you for watching!

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