



**Industry**

Manufacturing

**Customer**

Oral-B

**Business Challenges**

- Provision of timely and accurate information to sales staff in the field
- Management of sales data distribution done in-house
- Elimination of expensive and cumbersome third-party resources

**Business Solution**

**Livelink for Enterprise Report Management, Livelink for Production Imaging**

- A report management solution to enable automatic capture, indexing, segmenting and distribution of spool file reports
- Convenient and secure access to data from anywhere and anytime
- Significant cost savings realized as data extraction and distribution are done in-house
- Minimal IT support required

**Oral-B — Keeping sales forces smiling**

*Oral-B turned to the report management solution from Open Text™ to provide its sales staff with a convenient, timely, and secure access to vital information from any location, while allowing the company to develop the expertise and resources to manage this process in-house.*

**Organization**

A division of The Gillette Company, Oral-B provides a full range of oral care products to meet the needs of consumers and dental professionals worldwide. The Oral-B brand is the leader in the \$4.5-billion toothbrush category, marketing toothbrushes for children and adults as well as interdental products such as dental floss, irrigators, and oral care centers.

Oral-B toothbrushes, the foundation and largest category of The Gillette Company's thriving oral care business, are used by more dentists and consumers than any other brand in the U.S. and in many international markets.

**Situation**

A major challenge for an organization like Oral-B Laboratories with a sales staff in the field is providing timely and accurate information to this critical team of personnel. Two major issues face a business when it comes to providing remote access to information: how to ensure convenient and secure access to information from anywhere in the world, and how to develop the expertise and resources to manage this process in-house.

Oral-B Laboratories faced these very questions as it examined its existing processes for distributing sales figures and pricing information to more than 130 representatives in the field. Not only did Oral-B need to capture and segment the reports on the IBM server, it also needed to make specific report information from the Belmont, California, headquarters available in a logical way to traveling and remote sales reps, sales managers, and regional managers. The Consumer Products Division (CPD) at Oral-B was the first division within the company to investigate utilization of the new technology.

Consisting of approximately 60 field representatives, the CPD sales force is responsible for sales of Oral-B products to retail establishments that carry its products. Oral-B was using a third party vendor for distribution of sales data. The process involved transmission of data from the Oral-B IBM server to a remote location where the sales data was extracted, compiled, and sent out to the individual managers and field reps. Not only was this process cumbersome, it was also expensive. Furthermore, the sales force had requested features and functions that were not available through the third-party resource.

**Solution**

Late in 1996, Oral-B's CPD evaluated enterprise report management (ERM) technology from Open Text™, which automatically captures, indexes, segments, and distributes spool file reports. The overall solution consisted of two main components: a report management application running

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**Gary Hensley, Manager, Technical Support, Oral-B**

on the Oral-B IBM server, and a client program running on the laptop assigned to each manager or sales rep in the field. The bottom line was that Oral-B sales staff in any location would have the ability to access timely report information, with minimal IT staff support or intervention.

Based on a positive preliminary evaluation of the Open Text solution, CPD granted Oral-B's IT support department's desire to implement a solution as soon as possible and committed to the Open Text products, including Livelink for ERM and Livelink for Production Imaging. CPD agreed to participate in a pilot project, championed by Patrick Durham, Oral-B's senior financial and sales information analyst.

"We were pleased to find a software solution that utilized our existing system resources," Durham said. "After all, the reports are created on the IBM server; why not manage them there, too?"

Livelink for ERM automatically captures, segments, and distributes reports on the host side, based on report type and output queue — this functionality was a key factor in the Oral-B decision to select the Open Text solution. Once the spool file is processed, the sales staff can access this information at their convenience via the Internet. The report bundles are downloaded to the remote laptop computer based on the user ID and password assigned to the rep. Once the download is completed, the reps have the ability to view the reports via the solution viewer.

Installation of the system components proved to be very straightforward. The server software was installed in less than an hour on the Oral-B IBM servers, and the appropriate reports were configured for automatic capture, indexing, segmenting, and distribution in less than half a day. Oral-B IT staff then proceeded to load the client portion of the solution on each of the laptops to be used in the field.

With the CPD pilot program completed, another division of Oral-B, the Professional Products Division (PPD), also sought to modernize its sales force of 70 field reps by upgrading its DOS-based contact management system. Being responsible for sales to dentists and dental dealers, the PPD wanted to provide its field representatives with remote access to IBM server-based sales reports and data. While the original implementation of the Open Text solution for the CPD was working well, the PPD took this opportunity to increase viewer functionality and flexibility for its specific needs.

The next step involved review of the CPD implementation and compilation of modifications collected as a result of feedback from the pilot project. At the same time, Gary Hensley, Manager of the Technical Support department, proposed updating the solution's functionality to meet the specific needs of the PPD. Again, meetings and memos exchanged between Oral-B and Open Text outlined the scope of the functional upgrades and a timeline was established.

Working with Open Text development staff, the PPD outlined its requirements to improve access to sales data. These enhancements included locking of report headers during viewing, the ability to create and organize reports in user-defined folders, and the ability to sort contents of folders by report name, description, and date.

"It was nice working with a responsive company like Open Text. Our field reps can be demanding, as this system's ability to perform could very well affect their livelihood," Hensley said. "Through our cooperative efforts with the development staff, we delivered a solution that met the reps' requirements exactly."

Staff training occurred in several stages. Open Text instructors provided initial, on-site training for the Technical Support Department at the Oral-B headquarters. Subsequently, the sales staff participated in Open Text-led sessions designed specifically for software training. The Technical Support Group now provides ongoing training and support for new personnel.

### Benefits

As a result of the pilot program, the collaborative efforts of Oral-B and Open Text have produced a combination of technology that has significantly enhanced the ability of sales professionals from two Oral-B divisions to access vital data in a timely manner.

At the same time, significant cost savings are realized. Data extraction and distribution occurs in-house by Oral-B staff, on the same hardware that generates the original reports, rather than using third-party resources. The eliminated need for a third-party vendor also means faster output of data and more flexibility to meet specific needs.

In its final solution analysis, Oral-B is pleased with the pilot project results. Hensley pointed to the pilot project as a major benefit to the company, "With so many operating procedure parallels running between the CPD and PPD, we were able to learn a lot from the pilot project. As a result, when the time came to expand the project to another division, we were able to approach the vendor with a list of needed enhancements, which created a benefit for everyone at Oral-B who is using this product."

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