



## Customer Success Story: UniChem

### Overview

UniChem is a leading distributor and wholesaler of pharmaceutical, medical and healthcare products in the UK. The company offers a high level of service and provides a full complement of value-added services to pharmacies, including innovative marketing support; commercial support services and ethical compliance and data services.

### Challenge

Effective management of core processes is a key focus for UniChem, and a process of particular concern was its Trading Agreement Proposal (TAP) process. The TAP process is a critical set of procedures related to bringing on new customers and agreeing to the contract terms. In order to get authorization on a trading agreement proposal, it must go through a variety of people within UniChem's Sales and Finance departments for analysis, sign-off and approval.

UniChem processes approximately 30 TAPs per week and were using a five-page paper form with stapled attachments that was physically walked around the company for multiple approvals. The manual nature of this process led to inefficiencies including delays due to lost paper and lengthy approvals which in turn sometimes led to a loss of business.

To address these issues and to streamline the TAP process as well as other critical business processes, UniChem turned to Business Process Management (BPM) software from Metastorm.

### Solution

By implementing the Metastorm BPM® suite, the company has transformed its TAP procedures into an automated, streamlined and highly efficient process.

Once a customer agrees to the particular terms and conditions

## Highlights

Manufacturing, Retail,  
Distribution

### Processes Enabled:

- Trading Agreement Proposal

### Customer Benefits & Results:

- Accelerated analysis and approvals of new trading agreements
- Reliable, secure audit trail
- Enhanced productivity
- Accurate, reliable and instantly accessible information
- Ability to put approval into the hands of field based Sales Managers

of a contract, TAPs are initiated electronically and automatically routed to be signed off and passed to the finance department for analysis and authorization. The capability of Metastorm BPM goes beyond just routing the TAP – anyone involved in the process now has complete visibility of its progress. This visibility allows anyone to immediately address questions on the status or content of a TAP, and this ability greatly enhances both internal efficiency and productivity as well as overall customer satisfaction. Additional functionality includes an audit trail, the ability to search and analyze TAPs, and the ability to automatically alert managers to potential bottlenecks in the process.

Once a TAP is approved, it is routed back through Metastorm BPM to the Sales administration team and a letter is generated and sent to the customer notifying them that their contract terms have been agreed but require customer sign-off before being implemented. If a TAP was rejected, it gets sent back to the initiator and is maintained in the system's data repository for future analysis and a complete history on all activity.

### Results

Using Metastorm BPM, UniChem has transformed a process that was extremely manual into a standardized, automated process that maintains and tracks activity from the date a trading agreement proposal is initiated through the duration of the approval cycle. The electronic nature of the new TAP form ensures the right information is being captured and as a result, TAPs can move forward without delays. It has also enabled UniChem to put the sign-off decisions into the hands of the Sales

Managers in the field by enabling increased visibility into what their team members are submitting resulting in more informed decision-making.

With Metastorm BPM, UniChem gained a single repository for all TAP information and a complete electronic audit trail on all process activity with the ability to quickly and easily identify where TAPs are in the process and therefore identify any potential bottlenecks.

Based on its success with TAP, UniChem plans to deploy additional processes that can be standardized on Metastorm BPM. The company has established a top-level team across various departments to generate ideas and manage the use of Metastorm BPM across the business. The “New Customer Account” process is the next in line to be deployed which is a follow-on from the TAP process but also has other entry points. This is currently a paper process that requires data checks, data set-up and sign-off from various people in Finance. Visibility into the progress of a new account is currently poor and is not standardized across the different account types. The automation and electronic enablement of functions within this process is very important since its current inefficiencies can lead to a loss of business due to accounts not being opened in time.

UniChem has been extremely pleased with how quickly and easily it has been able to automate and improve processes using the Metastorm BPM solution.

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