

CASE STUDY

Charles River Laboratories, Inc., Streamlines Customer Service Operations with Salesforce



Charles River provides essential products and services to help pharmaceutical and biotechnology companies, government agencies, and academic institutions globally to accelerate their research and drug development efforts. They provide products to improve and expedite the discovery, early-stage development, and safe manufacture of new therapies for the patients who need them.

Their growing client services group supporting the Research Models & Services division needed a more consolidated case management system to streamline communications, better access their knowledge base, provide real-time data for Key Performance Indicators (KPIs), and enhance both the employee and customer experience.

Client Relations and Call Center Teams Seek Improved Communications

The focus of this project included three Charles River teams of customer service subject matter experts. While these teams typically work independently, they often interact with each other, the Charles River sales team, and similar clients.

“One challenge we had was that members from each of these teams might be speaking to the same client on the same day with no knowledge that the other conversations were going on,” says Sarah Warren, Director of Client Relations and Strategic Business Innovation for the Research Models and Services division at Charles River. “We needed consolidated visibility into what our customers were asking to make sure we were aware of what was going on across all groups.”

Team members were using either shared or individual Microsoft Outlook in-boxes which was not a scalable solution. Hundreds of emails were coming in to each of the teams and there were many limitations, including knowing who was responsible for each email, managing what needed to be done, and determining if the customer was still waiting for a response.

Setting up, tracking, and measuring activity was also a problem.

“There was nothing in Outlook that enabled us to have any metrics around what people were doing,” says Warren. “We had managers and supervisors literally opening Outlook and hand counting the number of emails received by day by person to try to determine call and email volume, and the types of emails that were coming in. Understanding our staffing needs and monitoring productivity KPI’s at the team and

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- Sarah Warren, Director of Client Relations and Strategic Business, Charles River

individual level was basically impossible. Those were things that were critical to us.”

The situation was also affecting the customer and employee experience, two key focus areas for Charles River.

“There were some minor delays in response time with clients as a result of using Outlook,” says Warren. “When team members used their own inbox, it was challenging to transition work from one person to another particularly when someone was out sick and it was causing a certain level of frustration among the staff. With a shared Outlook mailbox, once we got to more than six or seven people in a mailbox it got to be clunky and cumbersome,” says Warren. “We needed a more elegant solution to handle this important customer communication.”



Charles River Selects Salesforce and Apps Associates

Charles River was already using Salesforce for the sales and marketing teams so expanding its use to the customer service

group was a logical choice. The team also recognized that they needed an outside, skilled organization to help with the migration.

“Our Salesforce rep recommended Apps Associates initially,” says Warren. “We interviewed three different vendors and we just felt Apps Associates came to the table with the most experience. They were familiar with our niche industry in the early research space and brought the best ideas to help. Their strategic view was critical and that helped sell them to me.”

Warren and her team had well defined processes, however, had the challenge of bringing three teams into Salesforce at the same time. Each team had its own common processes but there were inherently different scenarios for each group.

“That’s where the Apps Associates team was particularly good,” says Warren. “We knew the end game and basic flow of what we needed to happen, and they came in and were really helpful during the discovery phase. They helped us understand where the commonalities were and how we could push them further by streamlining things in Salesforce.”

Apps Associates Helps Implement a Transformative Solution

Working together, Charles River and Apps Associates developed and implemented a three-part replacement solution for Outlook that consisted of:

- Converting the case management system from Outlook email boxes to Salesforce cases
- Converting the Charles River knowledge base from the existing homegrown platform to Salesforce
- Creating alert/enhancements around queues in Salesforce

The solution now automatically streams customer emails into Salesforce and associates each one to the appropriate account contact. The new system provides full visibility across the entire organization.

“The knowledge and template functionality that Salesforce case management provides will continue to help us streamline operations,” says Warren. “We have a team of people that repeatedly answers similar types of questions so having easy access to scripted technical information is fantastic.”

Communications and Workflow Improved

The new Salesforce case management system has provided a solid base to allow for continued improvement for operations of the customer service team by enhancing both the customer

and employee perspective. Both customer response time and staff productivity can now be easily tracked, which are both critical business KPIs.

“Prior to Salesforce, people were using post-it notes, or notes in OneNote, or physical notebooks to keep information straight,” says Warren. “Now several people are telling me they have thrown away their notebooks because all the information is easily accessible in Salesforce.”

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Charles River Starting Phase II with Apps Associates

“I’m a big Apps Associates fan,” says Warren. “The team was amazing in being able to translate our non-technical input into Salesforce language and communicate effectively with our business and IT people. They were able to take what multiple people were saying and make recommendations on what the best practice would be. They helped us to focus and look at the most cost effective, obtainable solutions.”

Warren feels the Charles River and Apps Associates relationship is a strong one.

“I view them as a partner and that’s hugely important,” she says. “I’m normally on the vendor side of the table and I felt Apps Associates provided us with the level of service that I want to provide to my clients. And they delivered the project on time and on budget.”

Charles River is now planning phase II of the project which will bring the company’s Canadian Research Models & Services customer service team into Salesforce and provide enhancements that will allow for further process efficiencies and expansion.

“I would say we are setting ourselves up for future growth by transforming the customer communication channel,” Warren summed up. “I’m looking forward to continuing the partnership with Apps Associates.”



For more information about Salesforce services from Apps Associates, please visit www.appsassociates.com or call us at +1-855-399-0230.