

# Creating an Integrated Compliance System

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July 29<sup>th</sup>, 2014

# Integrated Compliance System

Unlock your data potential



# Integration of Salesforce.com to EtQ for Complaint Handling

**Amy Boyd**  
Global Quality & EHS Capabilities

July 29<sup>th</sup>, 2014

# Agenda

- Background
  - Kimberly-Clark Overview
  - Modules in Use Today
  - SalesForce.com Overview
- Business Need
- Goals
- The Solution
- Building the Interface
- Benefits Realized
- Future Plans
- Questions

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# Kimberly-Clark Overview

- 4 Business Units
  - Consumer Products
    - North Atlantic
    - K-C International
  - Professional (B2B, DIY, Safety)
  - Health Care
- 106 Manufacturing Facilities in 38 Countries
- 2013 Sales: \$21.1 Billion
- 57,000 Employees





## Medical Devices, Surgical Supplies, & Pain Management



Wipers, Gloves, Masks, Eye Protection, Respirators, Apparel,  
Soap, Hand Sanitizers, Air Fresheners, & Dispensers



# EtQ Modules in Use Today

- Complaint Handling
- Corrective & Preventive Action (CAPA)
- Quality Events & NCR
- EHS Events
- Document Control
- Record Management
- Training & Qualification
- Job Safety Analysis
- Change Management
- Specification Management
- Deviations
- Audit/Assessments
- Calibration Management
- Supplier Management
- Permit Management
- Risk Management
- External Standards & Regulations



# SalesForce.com



- Customer Relationship Management tool.
  - Accounts
  - Contact information
  - Forecasting
  - Pricing
  - Customer Order history
  - Sales leads and references
  - Ordering
  - Internal inventory
- Mobility and intuitiveness are essential.
- Software as a Service (SaaS) or “Cloud” based.

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# Business Need

- North American Professional business needed a new complaint handling tool to support a growing and evolving business.
- Sales team needed a simple, mobile way to have visibility into complaints for their customers to help drive customer relationships and satisfaction (and view all customer related information in one system).
- Quality and operations needed workflow, reporting, and powerful functionality to decrease lead times, increase productivity & customer satisfaction.
- R&E and Marketing wanted to make more use out of complaint data (improved reporting capability).

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# Goals

- Decrease Complaint Average Days Open cycle time metric to 30 days or less.
- Establish a simplified complaint handling process that drives consistency.
- Eliminate manual complaint handling activities.
- Improve employee productivity in every step of the complaint handling process.
- Easy access and searching for complaints.
- Useful and powerful reporting to aid decision making, product improvements, and innovations.

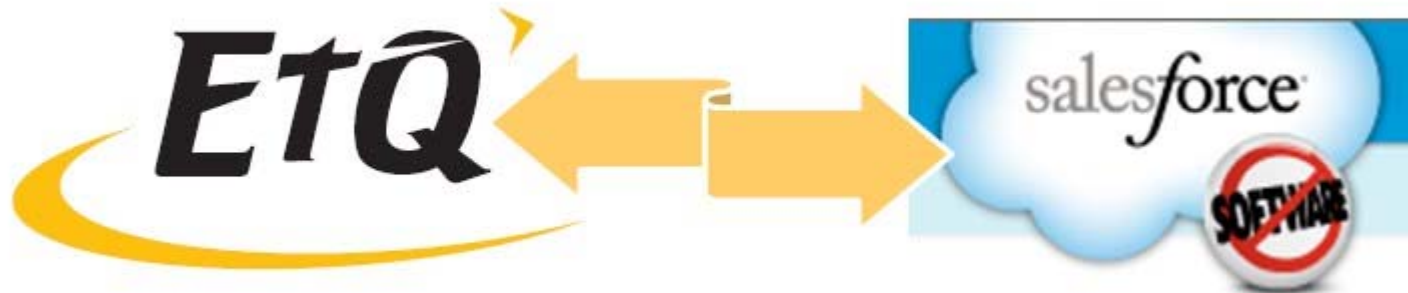


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# The Solution

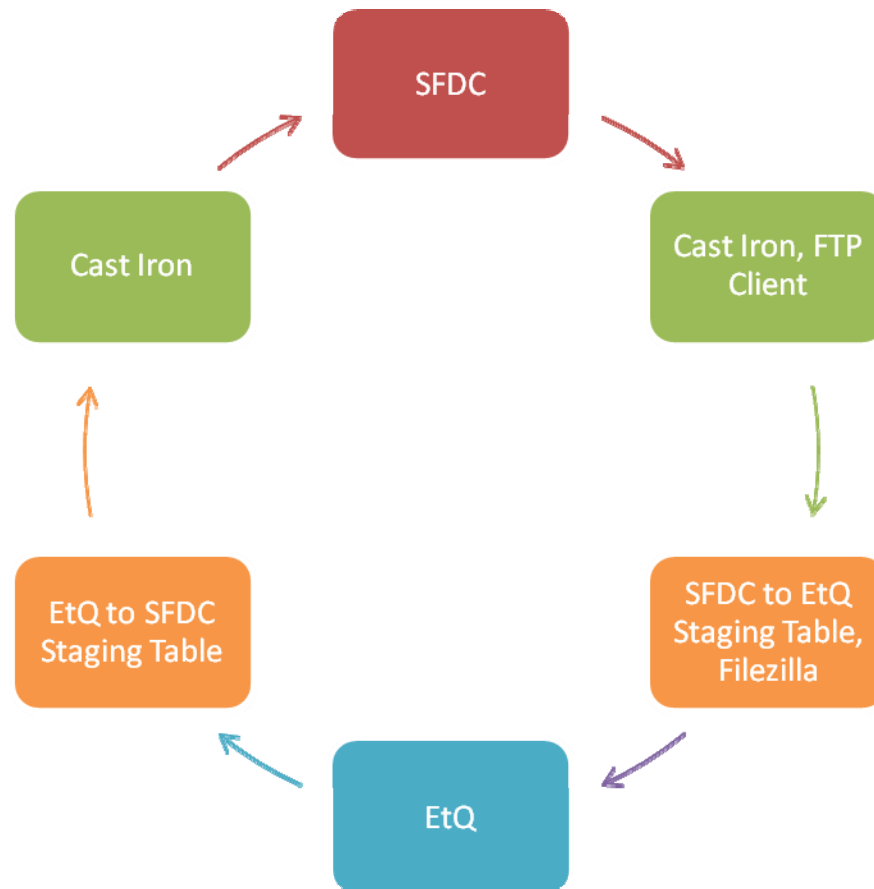
- Leverage the best features of **both** EtQ and Salesforce.com to meet our requirements.
- Build a Two-Way System Interface.



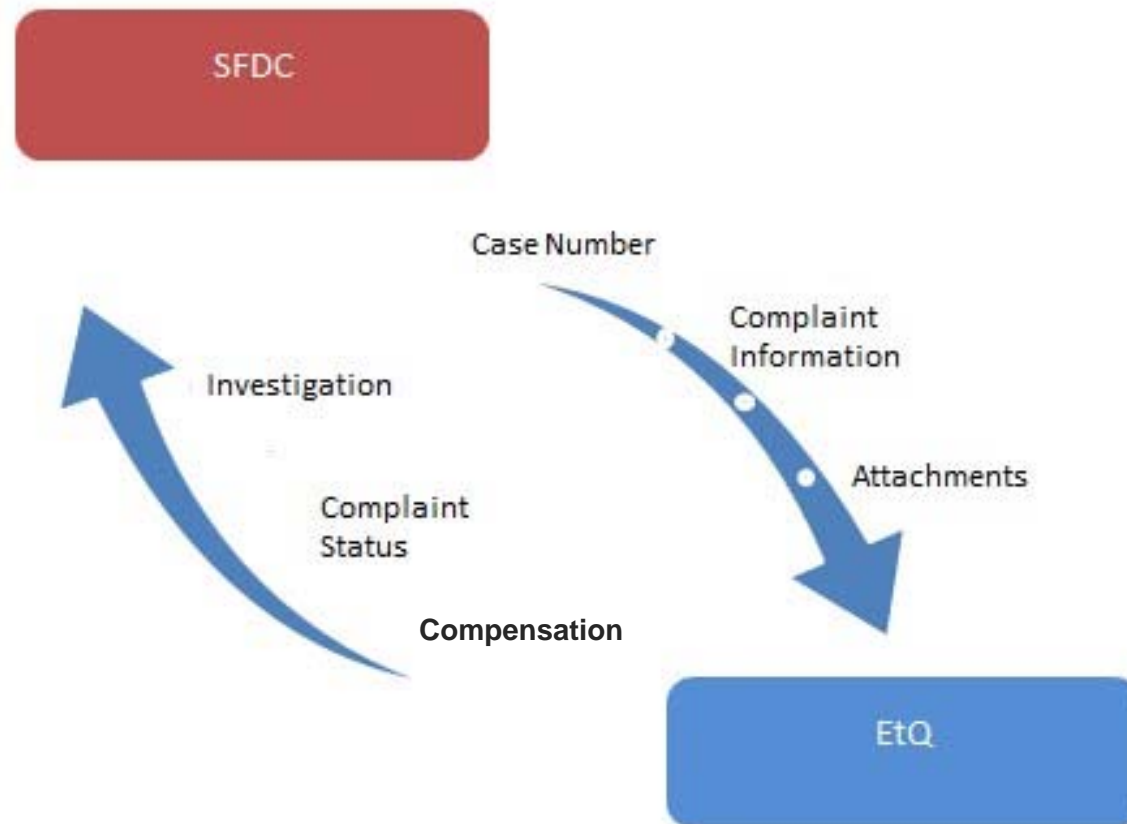
# The Solution

- 7 Step Complaint Handling workflow established in EtQ.
- Complaint Call Center and Salespeople enter complaint feedback into the “Case” form in Salesforce.com (SFDC).
- Complaint data and attachments are transmitted to EtQ Complaint Handling module and assigned.
- EtQ sends workflow phase change updates (and field changes) back to SFDC, so salespeople can quickly and easily check complaint status in SFDC.
- Enable investigation hand-off from staff organization to manufacturing sites and internal supplier Global Nonwovens within one complaint.

# Data Integration Process Flow

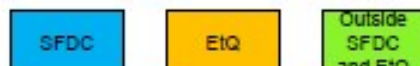
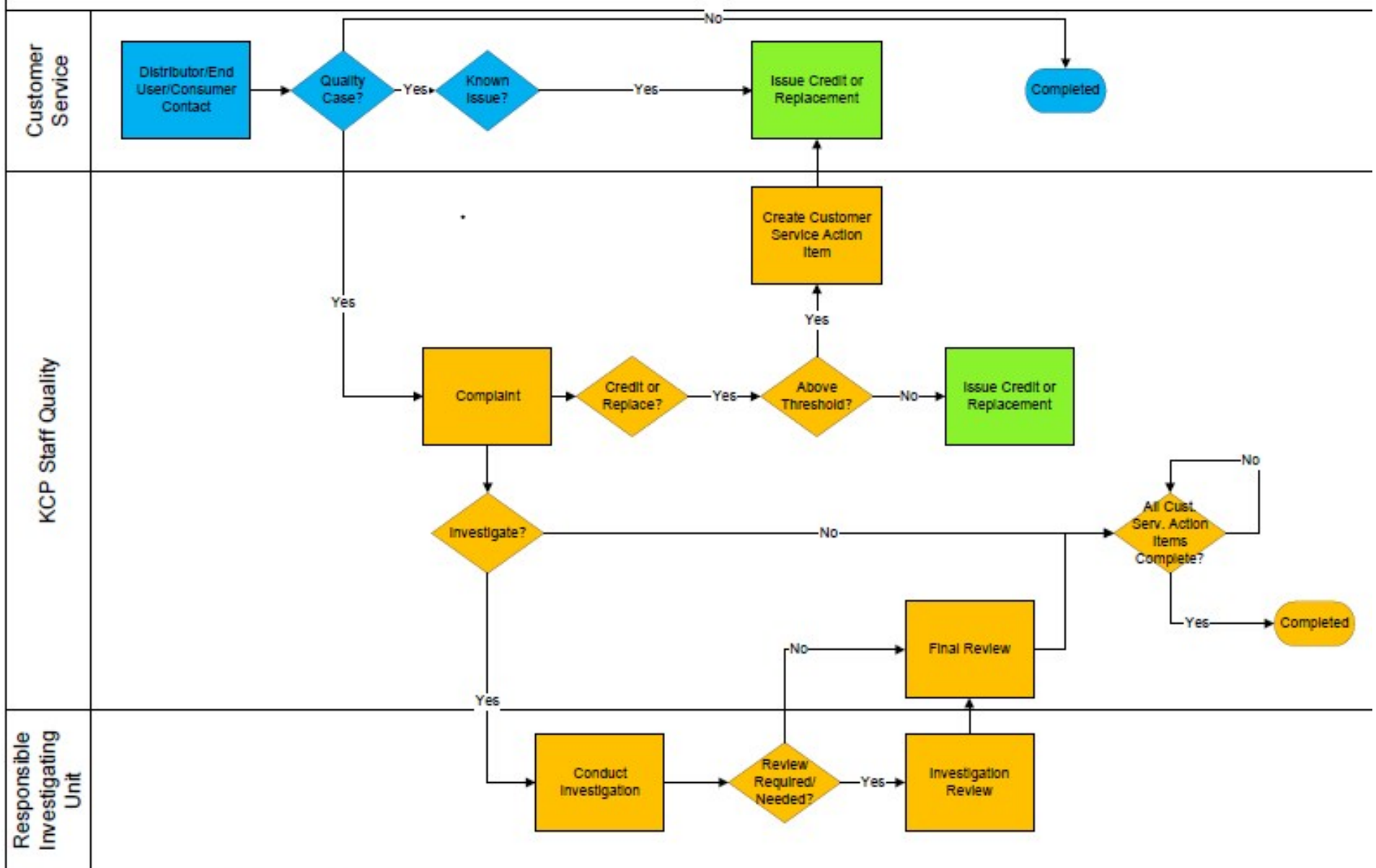


# Data Transfer Diagram



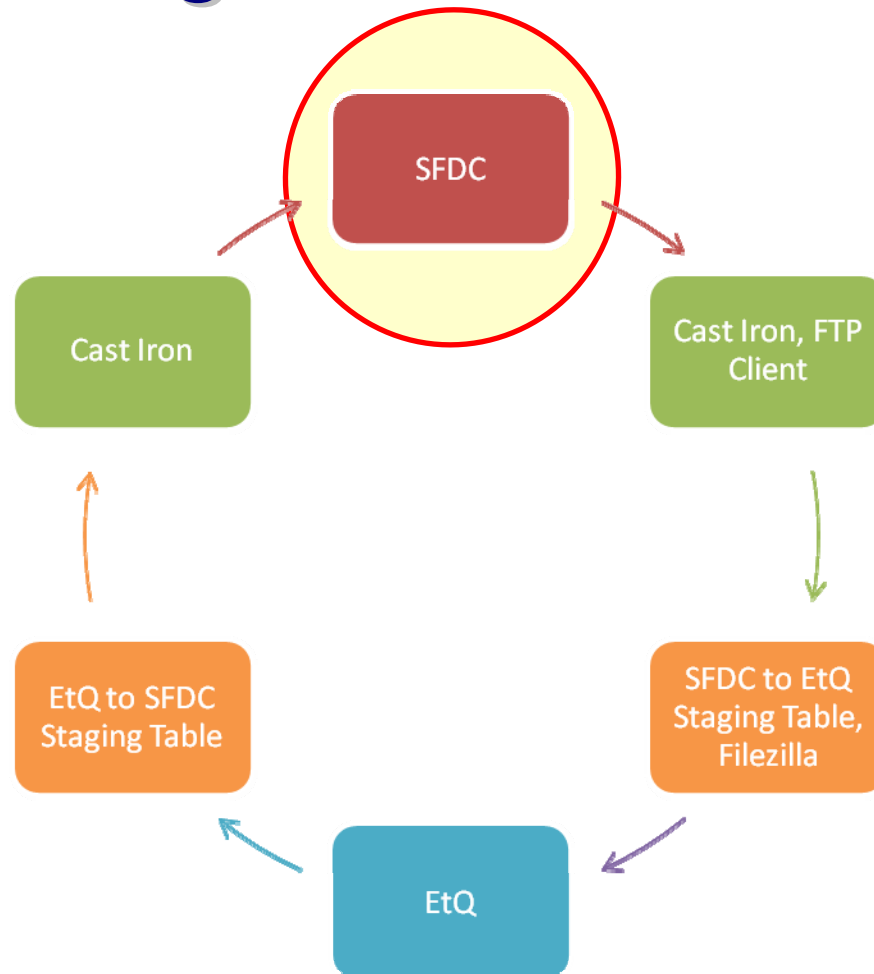


# KCP Complaint Handling: Complaints entered in SFDC and transferred to EtQ for Assessment/Investigation



# DEMONSTRATION

# Data Integration Process Flow



# New Case Form

## Open Activities

[New Task](#) [New Event](#)

No records to display

## Activity History

[Log A Call](#) [Mail Merge](#) [Send An Email](#)

No records to display

## Case Comments

[New](#)

No records to display

## Case History

Date	User	Action
7/22/2011 2:57 PM	<a href="#">Amy Boyd</a>	Changed Case Record Type from Quality to Quality Read Only. Changed Status from Incomplete to Submit.
7/22/2011 2:45 PM	<a href="#">Amy Boyd</a>	Created.

## Attachments

[Attach File](#) [View All](#)

Action	File Name	Size	Last Modified	Created By
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	<a href="#">ADF.JPG</a>	11KB	7/22/2011 2:50 PM	<a href="#">Amy Boyd</a>

# Case Information and Problem Description

Reimbursement/  
Credit can be  
initiated in SFDC  
or after  
Complaint has  
been created in  
EtQ.

Case Information	
Customer PO Number	<input type="text"/>
Date Purchased	<input type="text"/> [ 10/22/2011 ]
Is Customer expecting a Customer Letter?	<input type="checkbox"/>
Reimbursement Requested	--None--
Reimbursement Recipient	--None--
Available Picture or Document?	--None--
Potential Reportable?	No
Date Feedback Closed	
Confidential	<input type="checkbox"/>
KC Order Number	<input type="text"/>
RGA Number	<input type="text"/>
Credit Initiated	--None--
Credit Amount	<input type="text"/>
Credit/Replacement Date	<input type="text"/> [ 10/22/2011 ]
Replacement Order Number	<input type="text"/>
Replacement Requested	--None--
Investigation System Number (EtQ)	
Additional Information	
Status	Incomplete
Case Origin	CTM User Initiated
Description Information	
Subject	<input type="text"/>
Description	<div><div></div></div>
EtQ Comments	



Created by AMY BOYD, 10/22/2011 5:14 PM

Last Modified by AMY BOYD, 10/22/2011 5:14 PM

[Edit](#) [Submit to EtQ](#)

#### Open Activities

[New Task](#) [New Event](#)

No records to display

#### Activity History

[Log A Call](#) [Mail Merge](#) [Send An Email](#)

No records to display

#### Case Comments

[New](#)

No records to display

#### Case History

Date	User	Action
10/22/2011 5:14 PM	<u>Amy Boyd</u>	Created.

#### Attachments

[Attach File](#)

No records to display

When all required information has been filled in, the “Submit to EtQ” button is clicked.

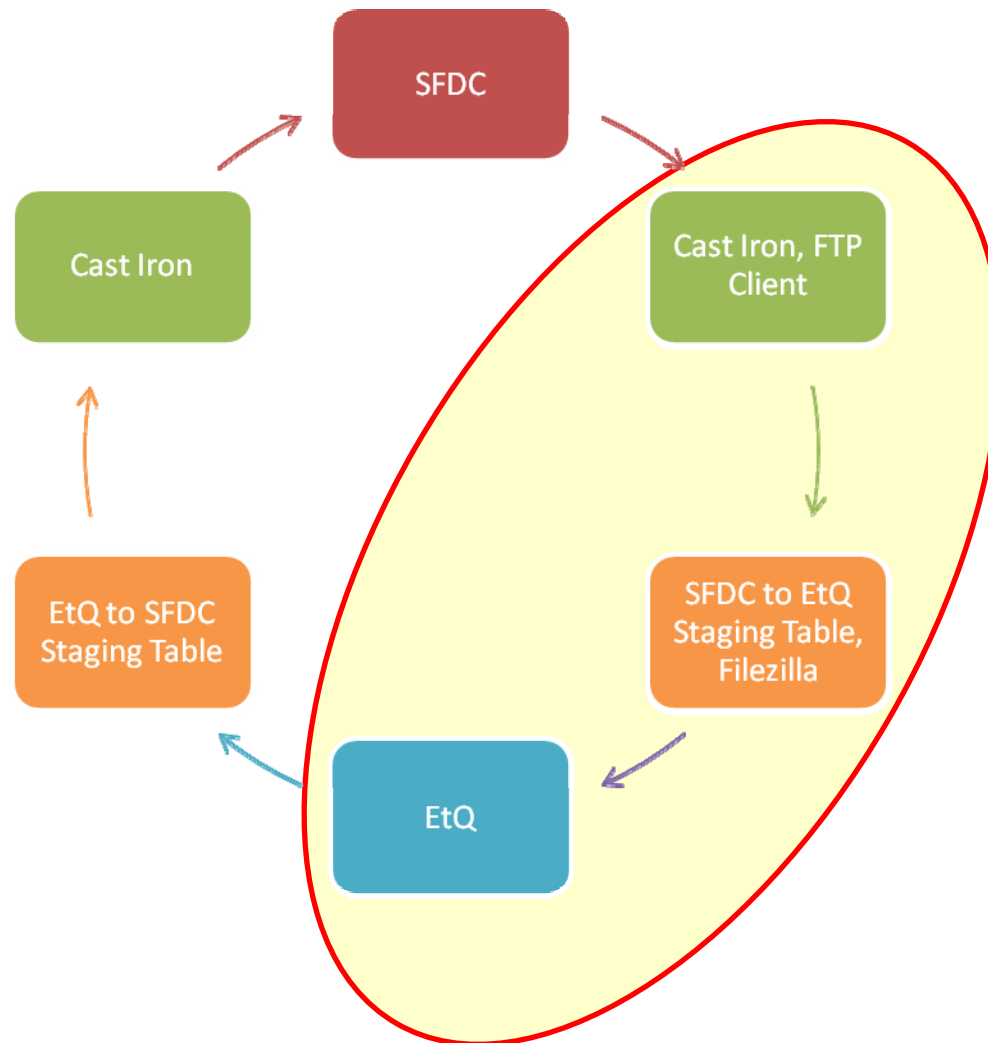
File(s) can be attached and will be sent over to EtQ.

Status is changed to “Submit”

#### Case History

Date	User	Action
10/22/2011 5:23 PM	<u>Amy Boyd</u>	Changed Case Record Type from Quality to Quality Read Only.
		Changed Status from Incomplete to <b>Submit</b> .
10/22/2011 5:14 PM	<u>Amy Boyd</u>	Created.

# Data Integration Process Flow



# EtQ Complaint Handling

Complaint Handling # COMP-NKP-11-00129 Created by System on May 11, 2011 8:20:13 AM

Initial Customer Feedback Preliminary Assessment / Determination **Complaint Investigation** Investigation Review Final Review Communications Completed

Complaint Information Prelim. Assessment / Investigation Complaint Review Related Form(s) Cost Information Access Control **All Tabs**

**Complaint Information**

Last Comment Comments ( [Add](#) | [View History](#) )

Boyd, Amy H, Jun 23, 2011 9:17:40 AM, Complaint Investigation:

Complaint Number: COMP-NKP-11-00129

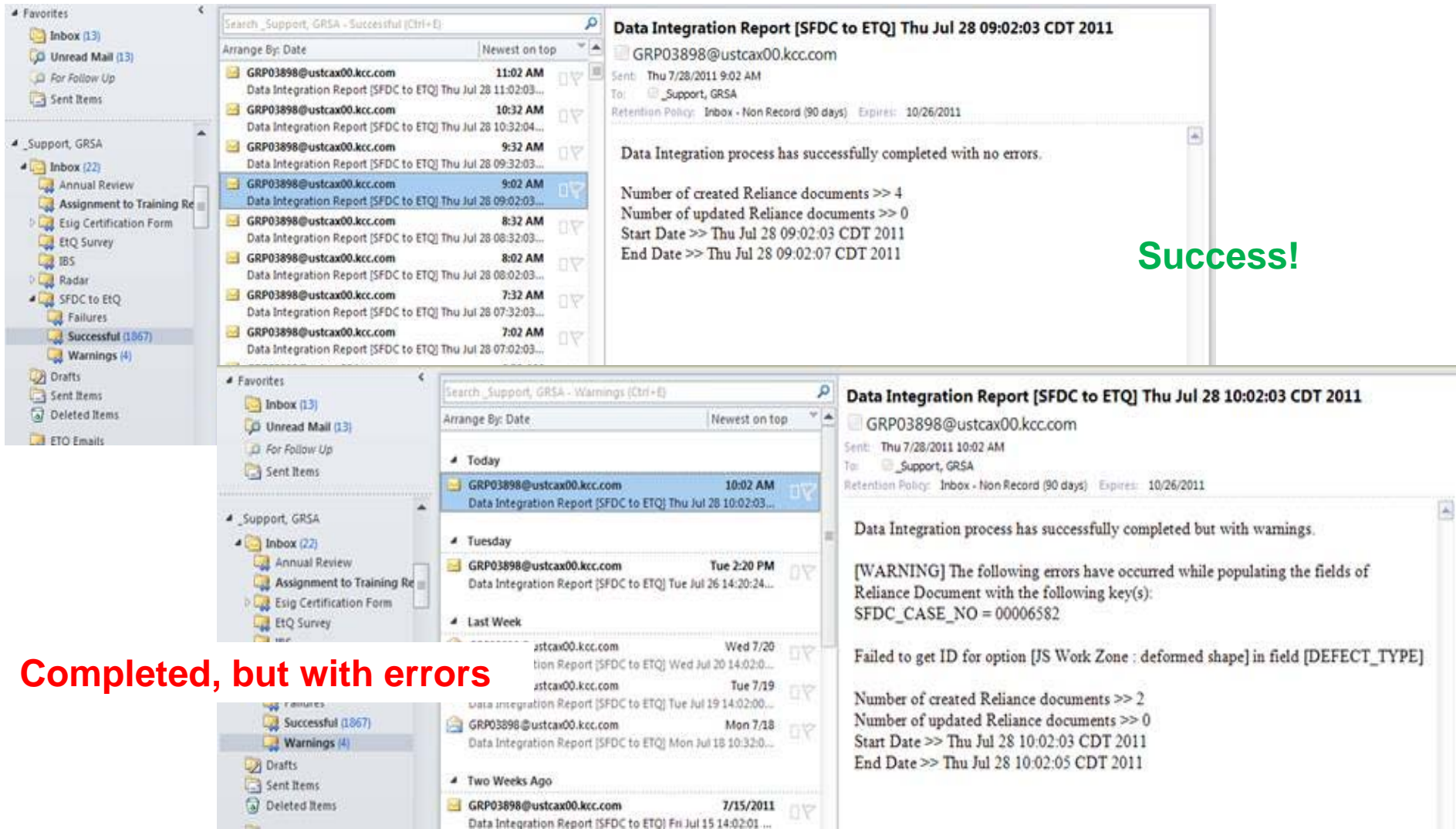
Document Links  
COMP-NKP-11-00170, Type: Product Quality, Prod. Desc.: SCOTT,NPKN,NPKN,-,-,250, Status: Investigation Review, Defect: This complaint is fr, Due Date: June 11, 2011, Org.: North American - K-C Professional; Mobile Mill

Other Links

Applicable Organization(s) Staff : Business Unit : North American - K-C Professional Staff : Business Unit : Global Nonwovens		Responsible Business Unit K-C Professional	Complaint Source Sales Force.com
Alert Date May 10, 2011	Event Date	Sales Contact	Sales Contact's E-Mail
Requested Compensation None	Reimbursement Recipient Distributor	Sales Territory	SFDC Case No. 00003180
		Case Submitted By Dandu Barambh	Submitted by ID 071070

- 7 Step Process.
- Initial Customer Feedback phase is completed by SFDC.
- Traceability in both systems.

# Data Import Reports



**Successful Report:**

**Data Integration Report [SFDC to ETQ] Thu Jul 28 09:02:03 CDT 2011**

GRP03898@ustcax00.kcc.com

Sent: Thu 7/28/2011 9:02 AM

To: Support, GRSA

Retention Policy: Inbox - Non Record (90 days) Expires: 10/26/2011

Data Integration process has successfully completed with no errors.

Number of created Reliance documents >> 4  
 Number of updated Reliance documents >> 0  
 Start Date >> Thu Jul 28 09:02:03 CDT 2011  
 End Date >> Thu Jul 28 09:02:07 CDT 2011

**Warning Report:**

**Data Integration Report [SFDC to ETQ] Thu Jul 28 10:02:03 CDT 2011**

GRP03898@ustcax00.kcc.com

Sent: Thu 7/28/2011 10:02 AM

To: Support, GRSA

Retention Policy: Inbox - Non Record (90 days) Expires: 10/26/2011

Data Integration process has successfully completed but with warnings.

[WARNING] The following errors have occurred while populating the fields of Reliance Document with the following key(s):  
 SFDC\_CASE\_NO = 00006582

Failed to get ID for option [JS Work Zone : deformed shape] in field [DEFECT\_TYPE]

Number of created Reliance documents >> 2  
 Number of updated Reliance documents >> 0  
 Start Date >> Thu Jul 28 10:02:03 CDT 2011  
 End Date >> Thu Jul 28 10:02:05 CDT 2011

## Product Information

More ▾

## Defect Description

This complaint is from the distributor, Craig. His end user goes through 180 cases of 98730 per month. Recently they feel the quality of this napkin has decreased a lot. They said the napkin now seems softer and less durable. They said it is almost more tissue like. They are not looking for any compensation, but want to know if the product has been changed at all. They have noticed this issue with the lot above, as well as ha105520525d. All information should be provided through the distributor rep. Please let Craig know, if the 98730 has changed, or if there was a bad run. Thank you.

Lookup Material Number

Product Number

991098730

Product Short Code

98730

Global Product Code

Stock Code

Product Description

SCOTT,NPKN,NPKN,,-,250

Product Category

Towels ▾

Product Sub-Category

Tabletop Dispenser ▾

Product Line / Type

Dispenser Loyalty Number

Dispenser Serial Number

Date Dispenser Installed

PIMS Roll Number

Square Yards

Linear Yards

Cost per Square Yard

Lot Number / Date Code / Roll Number

HA0348202144d

Quantity Affected

0

Unit of Measure

Cases ▾

Defect Type

Folded Product : Poor Quality (explanation in "comments")

Failure Mode

Add Record

## Sample Information

Samples Available?

☒ Yes ☐ No

Sample(s) Contaminated?

☐ Yes ☒ No

Current Sample Location

201 Columbia Ave Lexington, SC

Location to Send Sample

Tracking  
Number

## Attachments

Sample Photo(s) and Other Attachments

Case00003180-Soap Dispenser.tif

## Action Item

Please save the form before you create an Action Item. After the Action Item is created, you will need to refresh the form and the link to the Action Item will appear.

Create Customer Service Action Item

Create Action Item

Customer Service Links

## Hidden Fields for SFDC

Manufactured Site

Global Nonwovens

Mfg Investigator

Nel, Warren, Boyd, Amy H

Mfg Investigator Names

Sample Status

Samples Available ▾

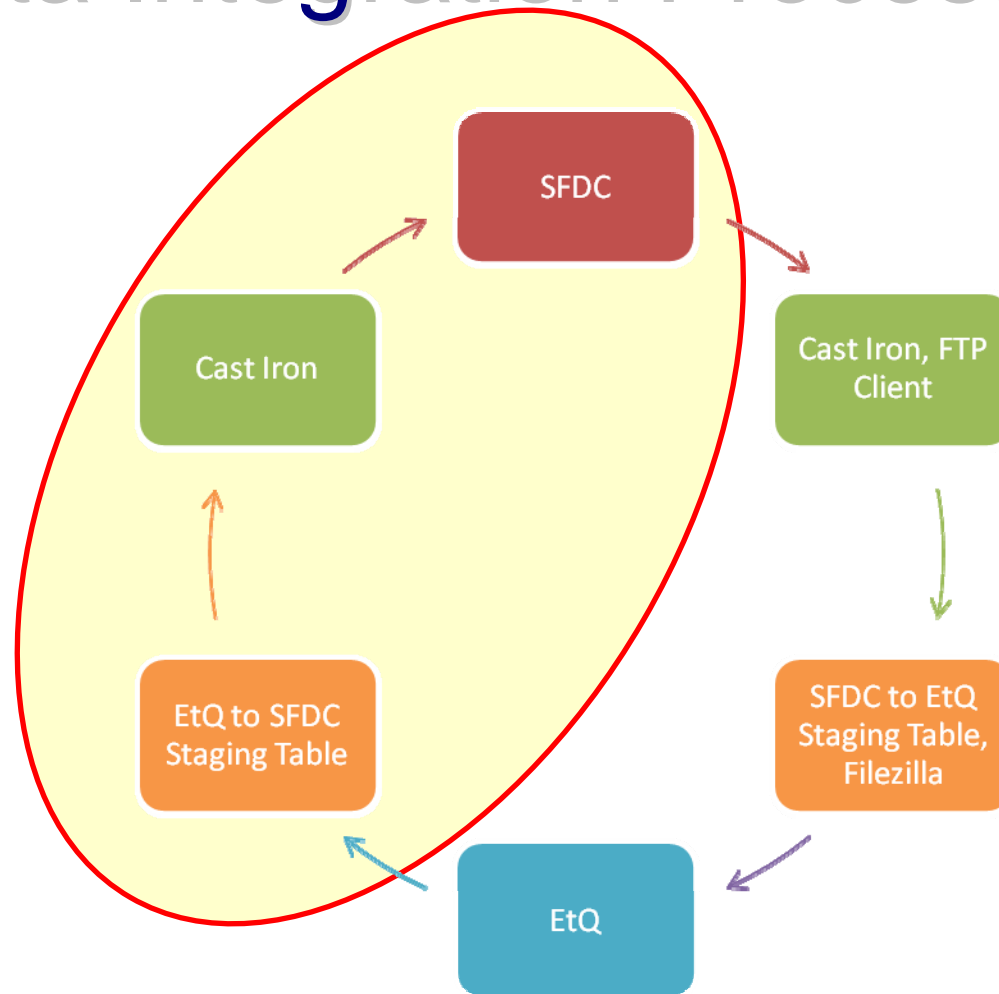
Mfg Final Response Date

Complaint Category


CAPA/QNC Status



# Data Integration Process Flow



# SFDC Updates


 00009005

[Show Feed](#)
[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Case Comments \(0\)](#) | [Case History](#)

## Case Detail

[Edit](#)

### ▼ Product Information

SAP Product Code	991021947	
Product Code	21947	
Product Description	JCKSFT.CRTDG.NITRO...1	Product
Product Date Code / Lot Number	X011089884	Product Sub
Event Date		
Product summary	<a href="#">Click here to view the Product summary</a>	
Batch code location		
Distribution Plant		
Last Sold Date		
CE Mark	<input type="checkbox"/>	
Notes		
EtQ assignee(s)	Boyd, Amy H	
Subject	MISSING RETAINER	

### ▼ Case Information


Reimbursement Requested	Replacement	Credit Initiated in SAP	No
Reimbursement Recipient	Distributor	Credit Note Number	
Available Picture or Document?	No	CIC number	
EtQ Comments		Credit/Replacement Date	
Investigation System Number (EtQ)	COMP-NKP-14-00485	Replacement Order Number	
EtQ Status	Preliminary Assessment / Determination	Replacement Initiated in SAP/KCRC	No
		Submitted to EtQ	<input checked="" type="checkbox"/>



# EtQ Complaint Profiles

Complaint Profile (New) Created by Bollenbacher, Benjamin on Jul 28, 2011 11:38:41 PM


Basic Access Control All Tabs





Last Comment Comments ( [Add](#) | [View History](#) )

Document Number Document Links  
Please Save


Profile Ownership


Applicable Organization  
\* Staff : Business Unit : North American - K-C Professional 

Form Prefix  \* Business Unit  

Complaint Handling Manager(s) 

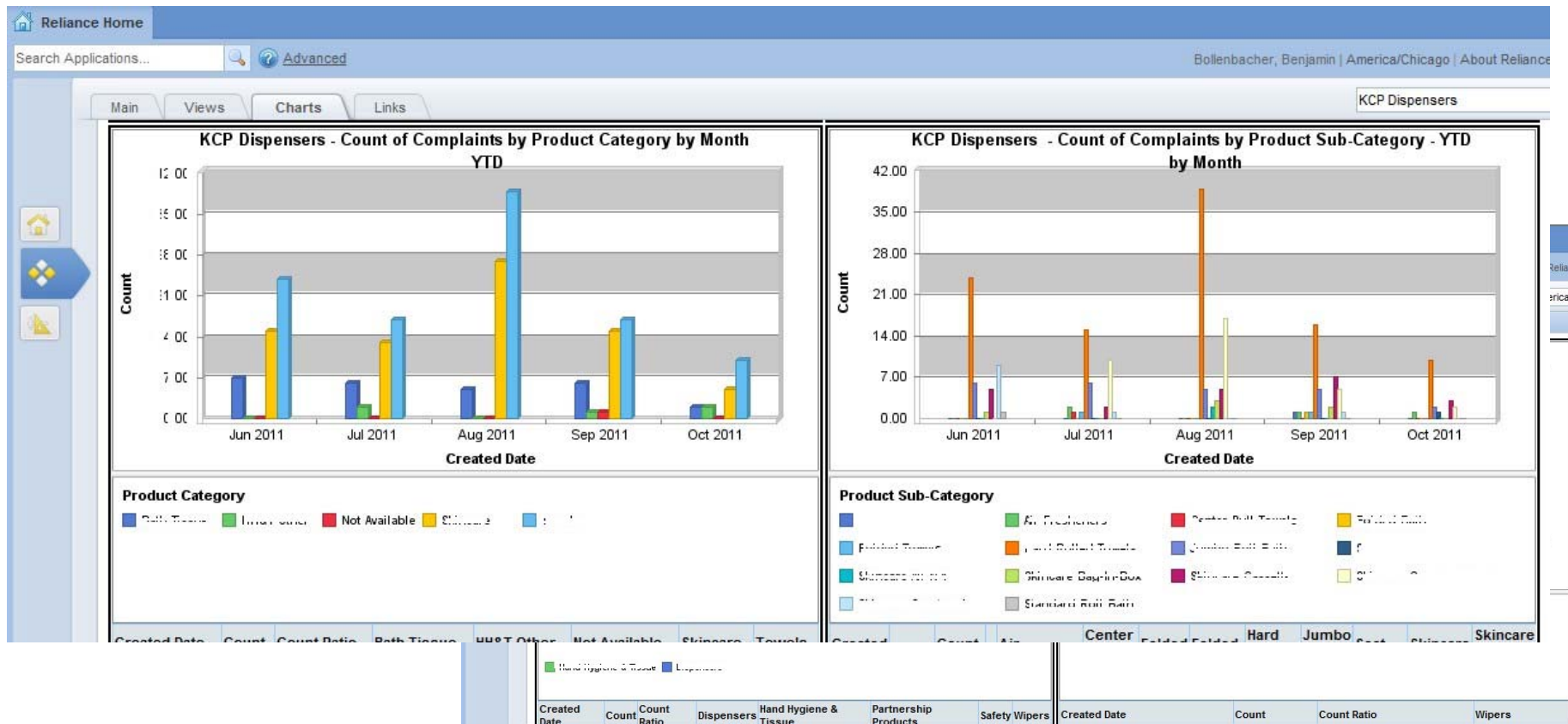
Assignments

Send Pre. Assessment Assignments to Group Mailbox ☐ Pre. Assessment Group Mailbox  

Send Investigation Assignments to Group Mailbox ☐ Investigation Group Mailbox  

# Product Category Portals in EtQ

Used by Marketing, R&E, Quality, Operations, and Leadership



**Note: Data for Demonstration Purposes Only**

# Portal Charts

- Have become very valuable.
- Real time, drill down enabled.
- So useful that leaders are simply log into EtQ whenever they want to view real-time charts instead of receiving monthly or quarterly charts via email.

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# Building the Interface

## Team

- Internal IT resources (3)
- EtQ programmers (2)
- Salesforce.com programmer (1)
- K-C business unit stakeholders (2)
- Global QA/RA compliance systems (2)
- Cast Iron programmer (1)

## Cost

- Less than \$100,000

## Time

- 6 months total (only 3 months for EtQ side of the interface)

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# Benefits Realized

- Sales, Quality, Operations (investigators) and Marketing are all happy.
- Significant Efficiency improvements.
  - Manual steps eliminated.
  - Assignments are completed on time, or manager is alerted.
- Significant lead time reductions.
  - Compensation approval workflow.
  - Each step in the process takes less time to completed.
- Complaint Average Days Open metric is below 30 days, already!
- K-C Customers are happy!

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# Progress and Future Plans

- Rolled out to Asia-Pacific from 2012–2013 and to Europe in 2014.
- Plan to rollout to Korea in late 2014.
- Adding more fields to send back from EtQ to SFDC so sales people know more about the status of the Complaint.
- Adding ability to send attachments attached to a Case from SFDC's Chatter functionality.

# QUESTIONS?

# Thank You!

Ben Bollenbacher  
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