

Community Blood Center of the Carolinas Case Study



INVENTORY
OPTIMIZATION
SOLUTIONS

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— Katie Risvold, Project Manager

About CBCC

CBCC is a local blood bank serving hospitals and patients in the Carolinas. A team of over 150 employees support five collection centers and mobile blood facilities. CBCC is a member of Blood Centers of America which is a cooperative of 51 not for profit independent community blood centers representing nearly 40% of the American blood supply. CBCC believes in a community-based philosophy: blood provided by donors stays in our community first to help family members, friends and neighbors, then excess supply is shared with other communities when it's needed most.

The corporate headquarters of CBCC is using the Envi solution from IOS to support a central warehouse in Charlotte, which leverages a spoke and wheel model to manage product procurement and supply distribution for all of CBCC's facilities. An additional warehouse in Greensboro supports supplies needed for mobile blood drives.

CBCC received the IOS Q2 2018 Best Practice Award, for their exceptional capabilities in the implementation of Envi® supply chain solutions, aligning people, process and technology to deliver greater automation, centralization, visibility and control to the organization.

The Situation

CBCC is a member of NBC, which had made a decision to bring all of their member blood centers onto the same purchasing platform and selected Envi® from IOS. “We were in the first wave of implementations,” said Katie Risvold, Project Manager, CBCC. “A schedule was created to bring all of the NBC-affiliated groups live on Envi and we were at the top of the list. We’ve been able to create best practices, procedures and project plans that will help all of the other blood centers as they prepare to go live.”

The Challenges

CBCC was looking to improve control and visibility into ordering done in remote locations, and to improve overall inventory management. “Julio Amador, Purchasing and Inventory Supervisor is our primary buyer and typically, other staff members would ask Julio to purchase items on their behalf,” said Risvold. “In our remote collection sites, we wanted to control and limit the quantities of what was being ordered, and standardize the list of available warehouse inventory across all sites. We wanted to ensure we were ordering the best products at the best price, while creating an easy and streamlined experience for end users. And finally, we lacked visibility to the inventory that was stored in remote locations, and at times found supplies were being overstocked. We experienced some waste due to product expirations.”

The Solution

“Our leadership team continually looks to drive innovation and pioneer best practices,” said Risvold. “As NBC made a decision to implement the Envi solution across member blood centers, we were excited to be among the first to go-live. Because we’re so committed to delivering the highest quality services on behalf of our organization, community and donors, we were excited about this project, knowing we could build new best practices that would help other blood centers as they got ready to go live.”

Goals

An internal implementation team was formed that included Katie Risvold, Julio Amador, and Don Wall, CFO. “Our goals centered on making implementation easy for our users, end-to-end process enhancements, and strategic alignment, enabling a new model of centralization, standardization, price consolidation and efficiency,” said Risvold.



Implementation

CBCC took advantage of an on-site implementation and training resource from IOS, which allowed them even greater expertise as they prepared for their go-live process. “Lanie Farkas from IOS came on-site and walked our team through our end-to-end processes, helping us map and finalize everything,” added Risvold. “She focused not only how would we change, but how would we benefit.”

“We created training itineraries and brought in a broad range of teams to be sure we were thorough in covering our workflows,” said Risvold. “We organized the implementation project based on tasks, process workflows and user roles. Julio did an exceptional job with data preparation and Provista provided us with data cleansing services. We did process mapping to compare previous to future state, and prepare users for change. When we went live, adoption was immediate. We spent time on training (both onsite and web-based) to make sure users were ready; everyone was required to participate in a training session.”

Business Process Change

Users in CBCC’s remote blood collection centers now use an easy interface to request the products they use and order routinely. They see a list of the supplies they order, which have been standardized on an approved organizational formulary. “They order via requisition, which goes to the warehouse for fulfillment,” said Risvold. “We get orders in for the coming week for remote locations. Meantime, Julio creates purchase orders to manage our overall supplies and orders for less standard items. He manages all of the ordering, and has done an exceptional job negotiating pricing for our now-aggregated products. We know we’re getting the best value.”

“Across our procurement processes, we’ve been able to replace manual, paper-based tasks with more automation,” added Risvold. “This has created much greater visibility to purchasing, inventory and usage throughout the organization.”

Outcomes and Results

From Katie Risvold:

“Purchasing was done primarily through the central warehouse before Envi’s implementation, but there is a more formal approval process now. Today we funnel all purchasing through the central warehouse function. Team members in the blood centers have

visibility to standard products and can create requisitions to replenish supplies. Julio manages supplies overall for the organization, and is able to ensure we’ve got the best prices on items we use. With our standardized formulary, we can now aggregate our purchasing and negotiate for better pricing.

“Envi is creating visibility into the overall inventory lifecycle – from ordering through item consumption. One of the previous challenges was not being able to track inventory stored in remote locations; we felt like we had waste due to product expirations. Now we can see our inventory and remove old or expiring items. We can track by lot numbers and expiration dates – overall, we have much better oversight throughout the organization. We’re not filling orders when we know there’s plenty of inventory already on hand.”

“We’re excited about the new reporting tools available through Envi. We envision a future where staff members in remote facilities won’t even have to create requisitions – we’ll be able to anticipate what they need.”

Control:

- Implemented a standard formulary with Envi Requisitioning
- Streamlined and simplified the user experience
- Built confidence we’re buying supplies at the best possible price
- Improved management of inventory; can see when supplies are low or overstocked

Process Consolidation:

- Consolidated several separate requisitioning processes into our main workflow
- Streamlined marketing and recruiting team’s process for ordering and managing supplies needed for donors
- Created overall inventory and ordering processes
- Moved to a nearly paperless quality and control process for our critical supplies

Team Approach:

- Developed internal communications for team preparation
- Partnered with the IOS team to facilitate process mapping, user training and user templates
- Achieved organizational adoption of Envi; seeing benefits across procurement processes



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