

USANA HEALTH SCIENCES

STREAMLINES WORKFLOW AND BOOSTS ACCOUNTABILITY WITH I-SIGHT CASE MANAGEMENT SOFTWARE



SNAPSHOT

Opened in 1992 by microbiologist, Dr. Myron Wentz, USANA Health Sciences is a manufacturer of supplements, skincare, and health foods, distributed internationally through direct sales. Now operating in 24 countries, USANA has had record growth for 23 of its 26 years of business and passed the billion-dollar mark two years ago.

With more than 450,000 independent distributors in 24 markets around the world, contract oversight is an important process managed by the compliance function in the legal department. USANA puts a high priority on compliance and accountability to ensure that the company can continue to provide opportunities for people all over the world that they might not have otherwise.

THE CHALLENGE

In the early 2000s, USANA was using a hybrid online system with limited capabilities for tracking and managing independent distributor compliance investigations.

Later, they built an in-house version, but it was also limited:

- > risk of losing data
- > lack of ownership and accountability in the process
- > low visibility into cases, performance and results
- > wasn't possible to see how long investigations were taking and who was accountable for what
- > updates to improve workflow and usability introduced risk to the data

USANA needed a better solution to track and manage contracts and related investigations.



THE SOLUTION

USANA needed a powerful case management system with the following requirements:

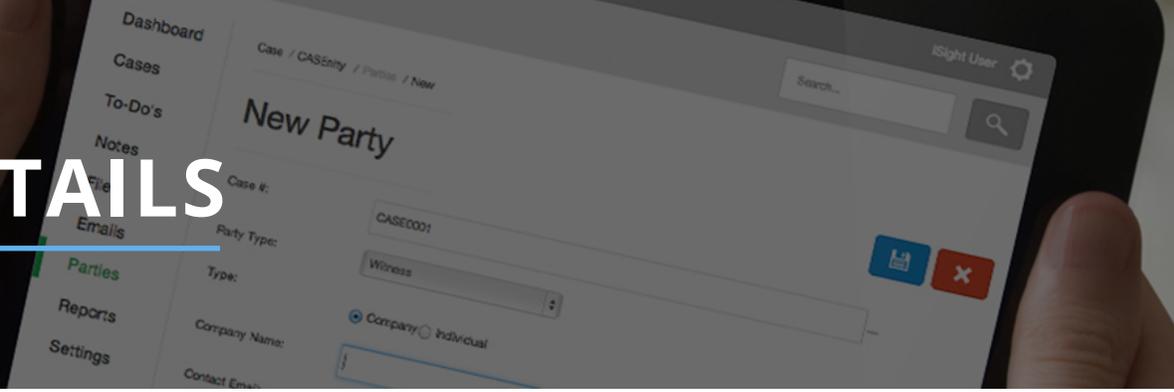
- > manage the entire workflow effectively
- > visibility into cases through reporting
- > strong reporting to provide insight into their operations, trends and risks
- > ability to customize workflow

THE RESULT

Since implementing i-Sight's user-friendly solution, the team is able to:

- > Customize workflow
- > Track and document everything in i-Sight
- > Ensure confidentiality
- > Follow a clear and consistent workflow
- > See where they stand in relation to KPIs
- > Resolve cases faster
- > Achieve accountability

THE DETAILS



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With more than 450,000 independent distributors in 24 markets around the world, contract oversight is an important process managed by the compliance function in the legal department. Distributors sign a contract that stipulates policies and procedures that they agree to uphold, including how they can promote the products, sell them, and what they can and can't say about them. With a strong focus on ethics, USANA puts a high priority on compliance and accountability to ensure that the company can continue to provide opportunities for people all over the world that they might not have otherwise.

THE CHALLENGE

In the early 2000s, USANA was using a hybrid online system for tracking and managing these contracts and the related investigations. The system had limited capabilities, combining a paper filing system with an online component to track the files. There was no mechanism for reporting or relating cases.

Later, they built an in-house version of a case management system in Jira. But this system was also limited. Case ownership had to be assigned back and forth between users, presenting a lack of ownership and accountability in the process. More importantly, there was limited visibility into cases, performance, and results. It wasn't possible to see how long investigations were taking and who was accountable for what.

As time went on, frequent updates to improve workflow and usability were compromising the system and introducing more risk to the data being housed in it. USANA needed a better solution to track and manage independent distributor compliance investigations.

THE SOLUTION

In 2015, Dallin Griffeth, Executive Director of Ethics and Education, began searching for a powerful case management system that could manage the entire workflow effectively, with strong reporting to provide insight into their operations, trends and risks. He was looking for a solution that provided the ability to customize workflow to match USANA's needs, and i-Sight emerged as the most effective solution.

i-Sight's customized workflow, with notifications to accommodate the levels that cases go through, made it the ideal solution for USANA. And the opportunities to deep dive into data through reports was critical for ensuring the ownership and accountability that was lacking in the current system.

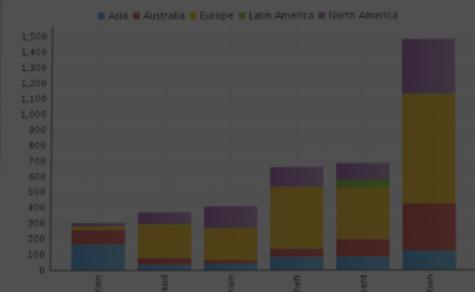
"It's really changed the way our first-line team does their casework and holds themselves accountable."

**- Dallin Griffeth,
Executive Director
of Ethics and
Education, USANA**

THE DETAILS

Home
Cases
To-Dos
Notes
Forms
Files
Emails
Parties
Reports
Settings

Allegation Count by Region
This report has multiple drill through enabled



THE RESULTS

Since travelling the world, forging relationships and developing an understanding of the USANA network, Griffeth feels a personal connection to the distributors who sell USANA products worldwide. For this team, ethical and compliant contract administration and fair investigations are more than just a business concern.

“Everything that we do we track in i-Sight,” says Griffeth. “Specifically, in investigations, it’s confidential. These are investigations where we could be terminating somebody’s distributorship. It could go to litigation. So, the way we house, manage and document this is crucial. We take it seriously. An organized, customizable case management system is crucial to our success.”

Since implementing i-Sight, Griffeth’s team has improved the way they manage and investigate issues related to contracts and complete administrative work and education. “The workflow is a lot more clear,” says Griffeth. “There’s a lot less guesswork. It’s really clear one step to the next step and all the fields they need to fill instead of writing everything in the comments, so it’s a lot more user friendly.”

The team has KPIs for the amount of time to resolve cases, and i-Sight’s guided workflow keeps investigations on track to ensure they progress quickly and close within a four-to-six-week window. “It’s about customer experience and the distributor not suffering through a long case,” says Griffeth. “We have an action button and if they contact a distributor through email or phone, they add the action button and it pulls up a series of questions. It guides them through that call or that contact, and it’s just been super-helpful for them to see how that process works and understand the need to move those cases through quickly.”

i-Sight has introduced accountability into the investigation process, and provided the ability for managers to see how long cases have been open. “Whoever is handling the case keeps that case in their ownership so they are accountable for it moving through the entire process,” says Griffeth. “It’s really changed the way that our first-line team does their casework, and holds themselves accountable.”

After just a few months of using i-Sight, Griffeth is optimistic about the future for his department’s performance and the possibilities for working with i-Sight to incorporate more processes into the solution. “The i-Sight team was amazing and continue to be.”

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