

Beckman Coulter Empowers Sales Force while Maintaining Control of Sensitive Information



Beckman Coulter, Inc.
Fullerton, CA
www.beckmancoulter.com

Industry:

Life Sciences

Annual Revenue:

US\$2.76 billion

Employees:

10,000

Oracle Products & Services:

Oracle Information Rights Management

Key Benefits:

- Enabled the company to connect the sales force to rapidly changing information
- Prevented redistribution of valuable information resulting from oversight or change in trust
- Created a shared space for internal groups to access information
- Eliminated the need for multiple groups within the organization to maintain similar data
- Gained confidence that information is only provided to intended recipients
- Gained the ability to revoke access to incorrect or out-of-date documents, ensuring that end users access only the latest versions

“Oracle Information Rights Management was a fundamental component of the launch of our online sales resource manual. It enabled us to manage our information classification, document security, and version control challenges with a single solution.”

– Teresa Blevins, Group Manager, IT Project Management, Beckman Coulter, Inc.

Beckman Coulter, Inc., a leading manufacturer of biomedical testing instrument systems, tests, and supplies, is in the business of simplifying and automating laboratory processes. In 2006, its Clinical Diagnostics Division looked to simplify its own internal processes, focusing on improving the way it provides dynamic information to its more than 500-member sales force without compromising security.

Like many organizations, Beckman Coulter has a field sales force spread across North America, with team members working from a variety of small regional or home offices. The company’s tactical marketing team, located at headquarters, provides sales team members with the information they need to sell effectively in a competitive market. This data includes a wide range of proprietary and sensitive information, including product specifications, pricing information, sales training material, customer case studies, and market intelligence.

Historically, the marketing group provided this information to the sales team in a large printed binder, known as the Sales Resource Manual (SRM). The company updated the manual on an annual basis, which made it challenging to provide current information to the field sales team.

Beckman Coulter wanted to create an electronic SRM for its team, but needed to ensure that its information was secure. It also had to be certain that field personnel could only use up-to-date documents and share them only with the audiences for which they were intended.

After careful consideration, the company selected Oracle Information Rights Management (formerly known as SealedMedia and Stellent Information Rights Management) to solve its classic information security dilemma. Today, the company's Sales Resource Manual Online (SRMO) puts up-to-date information at the fingertips of field sales personnel while ensuring version and distribution control.

Keeping Current while Maintaining Control

Beckman Coulter's printed SRM binder was large and cumbersome, making it difficult to transport and navigate. An electronic SRM would be easier for sales representatives to use, helping them improve productivity and effectiveness. It would also enable Beckman Coulter to revise and disseminate information quickly instead of waiting until the next annual update cycle.

While Beckman Coulter wanted to provide a version of its SRM on a CD or via an intranet site, it realized that an electronic format posed several challenges. First, it presented information control issues. Some of the resource documents in the SRMO were public marketing documents intended for widespread use with prospects, clients, and business partners. Other documents contained proprietary information that should only be disclosed to third parties under a non-disclosure agreement. Other documents were intended for internal use only. Beckman Coulter needed to ensure that the field staff would only use each document for its correct purpose.

Information security was also a concern. Beckman Coulter wanted to ensure that electronic documents containing proprietary and sensitive information did not fall into the wrong hands. In many organizations, field staff change jobs more frequently than the core product development teams, and often moves to direct competitors. Beckman Coulter needed to protect its electronic files to make it difficult for competitors to obtain sensitive information.

Version control was a third challenge with an electronic manual. A significant problem can occur when individuals use old versions of documents that contain outdated information. With an annually produced paper resource, version control issues are minimal. The landscape changes considerably with an online tool in which content is dynamic.

One of the advantages of an online resource is the ability to make frequent updates. The convenience of the electronic format, however, can lead to a proliferation of copies on local drives, on USB sticks, in e-mail attachments, and in shared workspaces. Individuals often use the copy of a document that is most easily available to them—frequently using previously sent e-mails as a source of documents.

Protecting Information Assets

To manage its information classification, security, and version control challenges, Beckman Coulter chose Oracle Information Rights Management.

The company worked with its consulting team to address information control with a five-level information classification policy. This system makes it quite clear which documents are intended to be shared with broad external audiences, which are for use under non-disclosure agreements, and which are for internal use only. Beckman Coulter sealed—encrypted and digitally signed—sensitive documents and uses Oracle Information Rights Management to enforce rules for which employees may and may not use specific documents.

The company also took aim at information security. With Oracle Information Rights Management, Beckman Coulter can control access to copies of documents wherever they have been distributed; ensuring that competitors cannot read sealed information. Furthermore, it can revoke access to documents when an employee leaves the organization, even if the employee has accidentally or deliberately made copies of the documents on his personal computer.

To enforce version control, Beckman Coulter tightened its document revision and approval policy, and built an application to control the master copy delivered by the SRMO Web site. Further, Oracle Information Rights Management can prevent individuals from opening outdated copies of superseded documents wherever those copies now exist, hence ensuring that they only use the correct master copy.

The Right Information at the Right Time

Beckman Coulter is experiencing substantial benefit from its SRMO and its Oracle Information Rights Management implementation. First, the new system ensures that the right information gets into the hands of the right individuals at the right time. Beckman Coulter now distributes and manages sensitive information online, ensuring that authorized individuals receive critical information in a timely manner. In addition, internal departments can now share confidential information with a remote workforce prior to public announcements and communication.

Beckman Coulter also has streamlined strategic planning by enhancing collaboration between internal and external teams and augmented sales force productivity by enabling instant access to information. Further, Beckman Coulter gained the ability to tailor rights to distributed information according to employee role. Field management now receives varied levels of information, which they can disseminate to their teams at their discretion to improve competitive advantage.

As important, Beckman Coulter can more effectively manage field personnel turnover—having confidence that employees leaving the organization would find it extremely difficult to transfer classified documents or digital capital.

Why Oracle?

We selected Sealed Media because of the number of features available in the product, compared to other vendors' solutions. Sealed Media functionality provided the ability to be as granular as we needed to accommodate a variety of different classification levels and contexts. The key differentiators were:

- The ability to have the rights “travel” with the document regardless of delivery method or application
- The ability to prevent screen captures
- The ability to respond to changes quickly and retain control to rights assignment

Implementation Process

Implementation was phased over the course of one year. The actual implementation of the server and defining process/policy was completed within four months. The remaining six months were spent in documentation control assigning classifications and uploading information to the document repository.

Advice from Beckman Coulter

- Plan carefully and begin with the end in mind
- Ensure documentation policy and procedures are sound and in place
- Manage expectations for your authors and use your authors to become your agents of change for your users
- Keep it simple

Beckman Coulter, Inc. is a leading manufacturer of biomedical testing instrument systems, tests, and supplies. Spanning the biomedical testing continuum—from pioneering medical research and clinical trials to laboratory diagnostics and point-of-care testing—Beckman Coulter's 200,000 installed systems provide essential biomedical information to enhance healthcare around the world.