

Case Study: Cell Phone Retailer Gets Connected with Policy & Procedure Manager®

Case study overview

Customer Profile

Carolina Telecom is an expanding communications and cellular phone retailer in the Cary, N.C. area that employs more than 50 people at its 11 retail stores and a corporate headquarters.

Challenge

Getting the same policies and procedures in place in a variety of locations is no small task. Using the company email was inefficient and impossible to track. Keeping policies current in each location proved a headache.

Solution

PolicyTech's Policy & Procedure Manager™ (PPM) software allows for internet-based storage and access of important documents, readership tracking, and automated review and approval of important documents.

About PolicyTech

PolicyTech develops and provides web-based software that manages policies and procedures in a convenient, reliable way. PolicyTech software is the policy management software of choice in a variety of industries including government, health care, education, and finance.

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"I feel that the biggest strength that Policy & Procedure Manager has is that it allows us to trace our documents. We know where each policy is in the process at all times. We can pull up all of the information on who needs to read it and who has read it."

--Larry Gross, Carolina Telecom

Summary

Carolina Telecom needed to keep employees current on company policies and procedures while working at a dozen retail locations in the greater Cary, N.C. area. The company tried unsuccessfully to use email to track documents but failed because of insufficient tracking capability. Using PolicyTech™'s Policy & Procedure Manager® Carolina Telecom took control of their policies and paved the way for expansion.

"We are redefining our entire business using Policy & Procedure Manager as our tool," said Larry Gross, Carolina Telecom Document Control Administrator.

PPM Brings Order and Accountability

"Before we used the Policy & Procedure Manager we did not have any policies or procedures that were formally in place that employees could find effectively," said Gross. "Since we have implemented Policy & Procedure Manager, we have expanded its use to all of the functions inside of the company."

Policy & Procedure Manager's web-based application allows each employee access to Carolina Telecom's policies via the internet. Using employee log-ins and a 'mark as read' dialogue, Carolina Telecom then tracks that each employee has read their assigned documents. Further, workers can be assigned different documents based on their responsibilities.

The system can be set up to automatically notify employees through email when they have new documents to read. Documents that change with time, such as insurance or sales policies, are set with a review interval so they can be updated. Finally, revised documents are archived so only the current policy is visible to readers.

"After Policy & Procedure Manager was implemented employees started to understand what was going on with company policies," Gross said. "Policy & Procedure Manager is the kind of thing that can help your business grow."