

Case Study

USANA Health Sciences

USANA Streamlines Workflow and
Boosts Accountability With Case IQ
Case Management Software

"Everything that we do we track in Case IQ. 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."

Dallin Griffeth
Executive Director of Ethics and Education



USANA
HEALTH SCIENCES

Project Overview

USANA Streamlines Workflow and Boosts Accountability With Case IQ Case Management Software

Strong Reporting Provides Insight Into Operations, Trends and Risks

The Challenge

USANA's in-house built investigation management tools were limited and ineffective. The management platform came with a constant risk of losing data. Low visibility into cases, performances, and results led to a lack of ownership and accountability in the process. It wasn't possible to see how long investigations were taking and who was accountable for what. Any updates to improve workflows and usability included a risk to the data.

Where their in-house system fell short:



A continued risk of losing data.



A lack of ownership and accountability in the process.



Low visibility into cases, performance, and results.

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 Case IQ emerged as the most effective solution. Case IQ's customized workflow, with notifications to accommodate the levels that cases go through made it the ideal solution for USANA.

Requirements for the new system included:



Managing the entire workflow effectively.



Visibility into cases through reporting.



Strong reporting to provide insight into their operations, trends and risks.

An In-House Case Management System Lacked Transparency and Introduced Security Risks

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. 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.

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.

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.

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USANA Needed Case Management that Was Flexible, Visible, and Secure

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Case IQ'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.

A Majority of Cases Closed Within a 4-6 Week Window Thanks to Increased Visibility and Accountability

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“Everything That We Do, We Track in Case IQ”

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 Case IQ,” 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 Case IQ, 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 Result

The team has KPIs for the amount of time to resolve cases, and Case IQ's guided workflow keeps investigations on track to ensure they progress quickly and close within a four-to-six-week window.

Case IQ 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 Case IQ, Griffeth is optimistic about the future for his department's performance and the possibilities for working with Case IQ to incorporate more processes into the solution.

Great case management tool

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Investigate and Prevent Workplace Misconduct with Case IQ


Case IQ helps you investigate, prevent and protect your company from fraud, harassment and compliance lapses to lower risk for your organization.

Find out more about how Case IQ can help your team conduct more effective investigations and prevent ethics and compliance lapses.

Book a demo:

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