

Products

salesforce sales cloud

Industry

Healthcare – Medical Devices

Profile

For over 30 years, Verathon has designed, manufactured and marketed pioneering medical devices. Their mission is to provide access to innovative, unique products and services that deliver a higher standard of clinical and economic utility for providers and the patients that they serve.

Company Size

500 Employees

Location

Bothell, WA



Sales Cloud streamlines processes & data transparency

THE CHALLENGE

- Verathon was using multiple, disconnected systems and had previously attempted to deploy Microsoft CRM, but failed.
- They needed a way to more effectively and accurately track their sales stages and forecast potential revenue.
- Their lead process was not well defined.
- They needed a centralized, standard way to identify and track products, prices and quotes.
- They had previously tried to deploy Microsoft CRM but the project had failed for several reasons including the fact that their team did not fully support it and they did not have a comprehensive understanding of needs and use cases.

THE SOLUTION

- Implemented Salesforce and Sales Cloud for 150 users, with sales stages, forecasting and workflows.
- Configured products, price books, and bill to / ship to in their org.
- Built quote approval processes and workflows to automate account and quote creation/update/deletion.
- Integrated Salesforce via ETL with Onyx and EDW systems for data exchange, and facilitated initial data migration.
- Created custom objects for contracts, products and GPO Memberships.
- Leveraged VisualForce and Apex triggers to brand their org, automatically convert leads, and generate quotes.
- Developed dashboards and reporting to provide increased visibility into their forecasting and pipeline.

THE RESULTS

- Verathon now has all of their sales and product information in a single system, with the exception of invoicing, which they intentionally kept separate.
- Sales Managers and teams now have greater visibility into each others' activities and can collaborate more effectively.
- They have a much more accurate view into their pipeline and can therefore develop better forecasting.
- Accounts and quotes are now updated automatically via their Onyx and EDW integration, reducing the potential for user error and incorrect data in the system.
- Data is fed into Salesforce daily from their order entry system via ETL integration, saving time associated with manual data entry.