



CUSTOMER CASE STUDY >>

The highest priority for Ortho Molecular was to find a CRM solution that would enforce a sales process and empower the sales reps to do their job faster and better than ever before.

The secondary project objective was to improve customer facing communication across all departments - Customer Service, Marketing, Sales, Science and Regulation, Accounts Receivable, and Special Projects. And finally, the company wanted to reduce administrative inefficiencies across the board.

THE SITUATION

Ortho Molecular Products helps people achieve optimal health through the formulation, manufacturing and sales of nutritional supplements. Their products are sold exclusively through the medical professional community. The company's 45 sales reps spend the majority of their time in doctors' offices, educating medical professionals about the products and the lifestyle programs that could deliver results for their patients.

As the company grew, the complexity of the sales process grew – and no two sales reps were doing the same thing the same way. Newly hired sales people felt lost. Seasoned reps were complaining that too much time was being wasted on administrative work. Management didn't have good pipeline visibility. Everyone had the feeling that leads were falling through the cracks. The company decided it needed a Customer Relationship Management system to create efficiencies in the sales process.

THE SOLUTION

After a competitive evaluation, Ortho Molecular Products chose Microsoft Dynamics® CRM from Ledgerview Partners. Microsoft Dynamics® CRM received high marks because of its Outlook integration, intuitiveness and its availability on a mobile platform. As an added benefit, Microsoft Dynamics® CRM could integrate with Ortho Molecular's Microsoft Dynamics NAV back office manufacturing and accounting solution.

"We felt very comfortable with Ledgerview Partners because their sales rep was so knowledgeable and responsive," says Andy Winkelman, Ortho Molecular Products Team Leader, East Central Region. "They've been a great partner throughout the process."

GETTING STARTED

Because there is so much flexibility and capability inherent in a Customer Relationship Management system, Ledgerview Partners put together a project plan to ensure that everyone was clear about the project goals and to ensure that the project objectives would produce the desired results. The team prioritized:

- > Lead management and routing
- > Automatic lead qualification
- > Sales activity tracking
- > Sales results reporting
- > Integrations for 360 degree customer information access including:
 - > Microsoft Dynamics NAV Financials and Manufacturing
 - > Mobile Access
 - > SharePoint

Ledgeview Partners incorporated a wide range of reports into CRM that integrated information between CRM and their "Data Marts." These reports eliminated the need to email reports to sales reps manually on a daily, weekly, and monthly basis. Most reports could be easily accessed from the CRM mobile application – which was a big win for the sales reps.

The team went live with phase one of the project within 60 days of signing on as a customer. While it took a little while for some of the team members to get used to doing things "differently," overall the project has been a great success and has achieved almost complete compliance with the new technology.

THE BENEFITS

CENTRALIZED INFORMATION

A major component of implementing Microsoft Dynamics® CRM was to mitigate the risks of something happening to an Ortho Molecular sales rep. Prior to CRM, client contact information was maintained solely by the sales rep. That meant that if a sales rep got sick or left the company, it would be difficult for another sales rep to take over the account without client contact information. Today, those relationships are easily transferred to a new territory manager.

STANDARDIZED SALES PROCESS

Ortho Molecular Products has been able to standardize an on-boarding process for new sales reps. Reps become productive much faster armed with the information they need to close the sale. Not only does the standardized sale process give the new sales reps confidence, it has increased their level of job satisfaction, and reduced employee turnover. Sales best practices should be easier to analyze, share and compare by benchmarking what top performers are doing right!

REDUCED ADMINISTRATION TIME

Each of the 45 sales reps were conservatively spending two or more hours daily on administrative work, equalling 90 hours a day, 450 hours a week or over 20,000 of wasted man hours per year. That is a lot of non-productive time! Ledgerview Partners was able to build automation, workflows and approval processes to streamline the steps needed to qualify a lead and close the sale.

ORTHO MOLECULAR PRODUCTS OVERVIEW

Sales force automation for a nutraceutical company
45 user implementation

Add ons:

- > CWR Mobility
- > Scribe

"Ledgerview Partners took the time to understand our processes, our company, and what we needed."

We estimate that Microsoft Dynamics® CRM saves us over 20,000 man hours per year!

We were looking for CRM to drive efficiency gains. We accomplished that – and so much more. Now we're in the driver's seat of our business!

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www.orthomolecularproducts.com



INDUSTRY
Nutritional
Products

**NUMBER
OF USERS**
45

LEDGEVIEW PARTNERS, LLC

At Ledgerview Partners, we work closely with your business to implement breakthrough performance improvements that drive extraordinary added value in your customer relationships. We provide your company with a holistic, end-to-end approach to customer relationship management through our sales and customer care professionals, and our expertise in Microsoft Dynamics® CRM.

Visit us at www.ledgerviewpartners.com or call (920)560-5571

