

Getting a Healthy Boost From Salesforce

VitalWare gets faster and stronger with CRM from Salesforce and Ledgeview Partners



Established in 2011, VitalWare was founded to help healthcare organizations with the overwhelming task of navigating the many regulatory changes taking place in today's healthcare environment. The company offers a variety of intuitive cloud-based technologies and advanced knowledge-sharing platforms designed to make the business of healthcare easier.

In 2015, VitalWare was ranked #123 in the Inc. 500 ranking of fastest-growing private companies in the United States, with their growth fueled by their ability to deliver best-in-class products and services that provide a powerful user experience. In other words, VitalWare identifies and simplifies the regulatory challenges facing their customers in the healthcare industry, which makes their lives easier. It's a good gig.

While VitalWare was helping customers solve their challenges, the young company realized it had a few of its own. Chief among them, VitalWare had painfully outgrown its CRM system. When the company was just getting started, it chose Zoho CRM because it had the basic features they required, and was extremely economical. But after four years of solid growth, it wasn't cutting it anymore. It didn't integrate well with other systems, and it didn't have the depth of functionality VitalWare needed to continue to grow. Data was too siloed, user adoption was low, and the lack of integrations meant that there was a ton of information on business activity that never made it into the system.

VitalWare needed to take a page out of its own playbook and choose some software that made its life easier. And that's just what it did.

THE SOLUTION

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Kyle Smeback, VitalWare's Sales Operations Manager, joined the company not long before it reached this vital transition point. Smeback was charged with overseeing the move from their old CRM system to a new one, one that would provide the depth of features that VitalWare needed.

Smeback knew they needed a solution that provided a more comprehensive platform for managing customer relationships. They needed a true system that would allow access to data, and more importantly, the ability to analyze that data. Smeback said, "I love systems. You get a chance to test a theory, measure it, and decide if something is working."

That's what led Smeback and his team to choose Salesforce as their CRM solution. Smeback explains, "Selecting Salesforce was based on the fact that it was a true platform, with a deep assortment of features and more support." VitalWare, as a SaaS company, understood the value that Salesforce could provide. But they needed someone to help them rapidly apply best practices and guide them through an aggressive migration timeline.

VitalWare chose Ledgeview Partners to help them work through that transition.

Ledgeview worked closely with VitalWare to do two critical things:



- Help VitalWare look at their existing CRM processes critically, then help them redesign and optimize them to take full advantage of what Salesforce could do.
- Help VitalWare clean and format their existing data before loading it into their new Salesforce platform so they knew their data was accurate.

The transition went, well let's use Smeback's words. He said, "It went flawlessly." In fact, even with an aggressive timeline, Ledgeview Partners was able to guide VitalWare through installation and configuration faster than planned, completing the transition a month and a half ahead of schedule.

Now that's some project management right there.

Smeback explains, "Our Ledgeview Partners project manager even handled fielding the questions from key employees during launch to make sure that things went smoothly."

THE BENEFITS

VitalWare has been up and running on their new Salesforce CRM system since April of 2016. In the short time since going live, the company's seen a night and day difference in terms of the activity they're capturing in the system. And that activity is fueling all kinds of change within the company.

First of all, the notably superior user experience Salesforce provides has driven high user adoption. More people are using the system than ever before to record more information than ever before.

Second, when Ledgeview helped VitalWare reengineer their lead conversion process, they developed a series of automated triggers that prompt next steps in the process. This has helped boost activity around each lead, and brought a new level of consistency to how the company follows up. They've become much more efficient, and their consistency has made their pipeline much more accurate.

Last, because the system's been adopted so deeply and because people are recording their activity consistently, VitalWare has more data to work with than ever before, and that data is more accessible to more people. Because of that, departments are collaborating more often and more easily than in the past.

VitalWare's new Salesforce CRM solution is off to a strong start, but Smeback and his team are just getting started.

They plan to continue streamlining how sales and marketing collaborate, using their new CRM solution as the hub for data-driven email campaigns using ActOn Marketing Automation in conjunction with Salesforce. Using the two systems together gives marketing a chance to measure the impact of their email campaigns, and make adjustments based on what the data tells them. Leads that qualify are automatically loaded into Salesforce where VitalWare's automated process guides them through a consistent, highly customized sales funnel.

With Salesforce, VitalWare finally has a CRM solution that gives them the functionality and the flexibility they need to continue to grow and make a positive impact on the healthcare industry.

But they wouldn't have gotten there so quickly and efficiently without the help of Ledgeview Partners.

"The fluidity between sales, marketing and inside sales has been dramatically improved."

Kyle Smeback, Vitalware Sales Operations Manager



Industry | Healthcare Company Headquarters | Yakima, WA

At VitalWare we make the business of healthcare easier through intuitive cloud-based technologies and advanced knowledge sharing. Our team shapes businesses in the marketplace by delivering best in class products and service for a powerful user experience. We identify and simplify challenges in an ever-changing and regulated industry, making your job easier.

Established in 2011, VitalWare was founded to help organizations with the overwhelming task of navigating the many regulatory changes taking place in today's healthcare environment. Led by Kerry Martin, President and CEO, VitalWare's management team boasts an average of over 20 years' experience in the development of web-based healthcare technologies used in over 1000 hospitals today. In 2015, VitalWare was ranked #123 in the Inc. 500 ranking of fastest-growing private companies in the United States. Learn more at www.vitalware.com.



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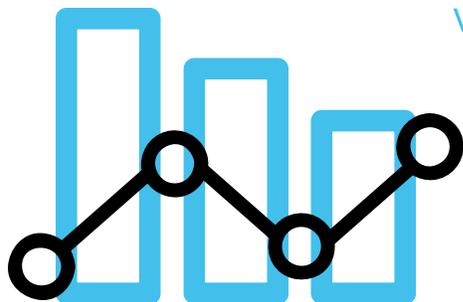
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Ledgeview Partners is a business and technology consulting company who partners with organizations to transform sales, marketing and customer service operations & processes that are supported by core technologies including Customer Relationship Management (CRM) and Marketing Automation.

Ledgeview Partners' consultants combine savvy business intellect with strong technological aptitude to provide solutions that extend well beyond software implementations. It's about building relationships, transforming business, and delivering phenomenal customer experiences.

Ledgeview Partners is a Microsoft Dynamics Gold Partner and a Salesforce Silver Consulting Partner.

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