

How to take a sales organization to the next level

Case Study

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A leading medical device company applies technology in a smart way to increase sales

A medical device company is selling equipment and services through direct and distributor sales channels. Nine months ago the company implemented SalesLogix, a leading Customer Relationship Management (CRM) system, but the promises of improved sales and customer service with CRM haven't materialized.

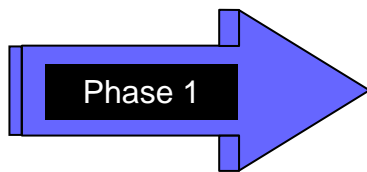
Challenges

As business landscape changes, business processes and the technology that support those processes must adapt and evolve. At this medical device company, their business processes evolved and changed since the Customer Relationship Management (CRM) project was originally designed. The technology, and processes, didn't adapt and hence the users felt the CRM system was ineffective and unintuitive.

- ✓ Customer data not shared with customer service or distributors
- ✓ Multiple, inconsistent systems used for sales forecasting
- ✓ Sales people not benefiting from the customer data keyed into the CRM system
- ✓ Sales territory conflicts with distributors
- ✓ Too much paperwork Pre and Post sale

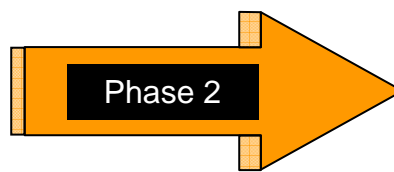
Solution

Facing budget and resource constraints, the company prioritized each challenge outlined above. Then a phased project plan was created, with each phase no longer than three months. High priority items were addressed first. Each challenge directly related for a need to improve the corresponding business process or policy, and the optimized process was articulated first before technology was changed.



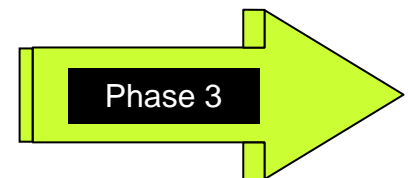
REDUCE CONFLICT BETWEEN DIRECT SALES FORCE AND DISTRIBUTORS

- ✓ Realign territories to reduce sales cross-over
- ✓ Reduce time spent by direct sales force supporting distributors
- ✓ Improve processes for customer and distributor support



PROVIDE CUSTOMER DATA VISIBILITY TO ALL DEPARTMENTS

- ✓ All departments push new leads to the reps via the CRM system
- ✓ Integrate proposal generation via CRM system, saving reps time and ties into forecasting
- ✓ Share customer support info with all depts., improving responsiveness and customer satisfaction



IMPLEMENT ADVANCED ANALYTICS AND WORKFLOW

- ✓ Implement functionality automating tasks and business rules
- ✓ Implement "Wizards" to guide users to the next best steps of a given process
- ✓ Streamline reports and allow users to "mine" their own data
- ✓ Identify new sales opportunities from customer profiling and analytics

About Peritum

Peritum Consulting has 14 years experience helping sales organizations become more effective and efficient with their sales efforts. We help companies streamline processes and apply technology in a smart way, resulting in increased sales and customer satisfaction. Peritum brings our clients large-firm consulting expertise without the high-costs and inflexibility. Contact Peritum today to learn how we can help solve your sales challenges and enable you to take your sales organization to the next level.



1-888-PERITUM
WWW.PERITUM.COM