

Fortune 500 Pharma Company Builds a Better Customer Journey with SUMO



The Importance of a First Impression

An on-boarding process is the start of a customer's journey with a business. It can define your company's reputation with a client. Understanding the importance of this process, a Fortune 500 global pharmaceutical company re-designed their vendor on-boarding process from the ground up.

Within Salesforce, the company's chosen CRM, the Pharma's global CRM team laid the foundation for a new process starting with building a community portal. They designed a customer journey that allowed for their call center agents to offer an easy and trackable method for vendors interested in the company's products to set-up an account.

Building a Better Process

The Pharma company chose SUMO Scheduler from the Salesforce AppExchange. The CRM team liked that SUMO was Salesforce-native, looked easy to implement, and had an attractive front-end for their vendors.

Appointment reminder options, also figured into their decision-making process as a key feature.

SUMO also met their security criteria and a discovery call made it clear that there would be no need for customization. These features made the decision to move forward easier.

The process starts with an appointment booking. After qualifying the vendor, an email is sent to them with a self-scheduling button. From a self-scheduling button embedded in the email, a vendor sets the date and time convenient for them.

Before SUMO, vendors trying to schedule their on-boarding session were subjected to the back and forth of email and phone tag. These tools were wasting time for both parties.

Vendors were not only getting stuck in an ineffective circle of communication, but it also depleted the time agents could spend on actual on-boarding activities.



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Improving Service by Saving Time

When the vendor self-schedules, they are placed in a queue for the welcome team. From this queue, they are distributed to a specific welcome team member to start the onboarding process.

An email confirmation sent to both the vendor and call center agent to whom they are assigned assures both parties are synced. Subsequent reminders leading up to the appointment date assure the vendor is less likely to miss the appointment.

Before SUMO, vendors wanting to do business with this Pharma company were subjected to multiple calls and emails. Timing became a major blocker to completing the on-boarding process.

Vendors could not set-up an agreeable date and time on first contact with an agent.

Agent productivity was diverted from getting vendors set-up to managing the scheduling and rescheduling of appointments.

By building appointment automation into their new on-boarding process, this Pharma company created a better customer journey. They also returned more time back to their agents to spend on real revenue-generating activities.

The Numbers

By adding self-scheduling into the onboarding process:

+45%

increase of call center agent usage, shifting time spent on email and phone exchanges

+200

appointments being processed a month.

