



## CASE STUDY



**Henry Schein One** is a dental technology provider and consultancy that delivers wholesale dental software solutions. Their model combines dental tech services, business coaching, and support to streamline the often-complex technologies used at dentists' offices. Henry Schein One's practice management system helps offices manage all aspects of the patient experience, including first contact and scheduling, treatment, billing, and loyalty programs.

### THE CHALLENGE:

#### ACCOUNTS THAT WEREN'T MEANINGFUL

Henry Schein One needed to organize their immense data hierarchies. They had over 150,000 accounts in Salesforce, often with complex data stored in ways that were difficult to interpret.

If a sales rep needed to respond to an inbound lead from a given dentist office, for one example, they would have to search in four or five different places in order to get an understanding of Henry Schein One's relationship with the office. It could be difficult to find the history of their interactions, whether they had made purchases and other information that the rep would need to connect with the customer. The sheer amount of data and the lack of a unified system for presenting it posed problems that the organization was actively trying to fix when they partnered with SaltClick Solutions.

Simply put, a Salesforce "account" wasn't representing Henry Schein One's real-world accounts in a meaningful or clear way. This posed particular problems for a larger organization like Henry Schein, where partners or new employees would benefit from a clear way to understand how to manage accounts through a customer relationships database.

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### THE SALTCLICK SOLUTION:

#### New Categories, Hierarchies and Algorithms

SaltClick was able to simplify Henry Schein One's accounts by creating four clear, simple classification layers: customers, locations, corporate accounts, and customer person accounts, a hybrid category that stored additional necessary data.

By diving into the reporting details and establishing clear relationships between data entry fields in Salesforce, SaltClick was able to streamline all 150,000 accounts into groupings. Each account was also changed to create a clearer presentation of data, changing fields and prioritizing information to make the account field as a whole meaningful, actionable, and accurate.

SaltClick built a collection of flows that took into account the relationship between different data fields in order to effectively achieve this sorting process. At the same time, SaltClick cleaned out the hierarchies of data in Henry Schein One's Salesforce system. Whereas before, hierarchies were complex, sprawling, and difficult to tame, afterward a cleaner system was in place that rolled up reporting metrics to overhead categories and top-level accounts.

This allowed Henry Schein One to more effectively manage their data.

### CUSTOMER REPORTED RESULTS: A Smashing Success

SaltClick changed Henry Schein One's Salesforce set up in just three months. In addition to exceeding project deadline requirements, SaltClick's new organizational system had immediate, tangible impacts on the business. One of the most important was the new ability to algorithmically determine strategic accounts. These were accounts that were most important for the business and would be named and assigned to sales representative. They carried downstream implication for the wider sales team, operations, and finance, changing the strategy for engaging with customers.



**purpose.**  
**passion.**  
**partnership.**  
**SALTCLICK**

The new Salesforce system used a rule set to evaluate each account, checking them against a complex set of requirements to determine whether or not an account was indeed strategic. Using the relationships between different Salesforce data entry points, SaltClick created an intuitive flow system that clearly indicated whether and when an account was strategic. The system was also more user-friendly, and it met Henry Schein One's key requirement that data could be managed through clicks, not code. SaltClick Solutions was able to solve problems with data organization while solving a major pain point for the business.



**SaltClick** is an award winning IT consulting organization specializing in delivering innovative cloud-based technology Salesforce® solutions to small and medium sized businesses.