



Northern Digital Inc.

Founded: 1981

**Industry: Medical Instrument
Manufacturing**

HQ: Waterloo, ON

**Solutions: Salesforce &
OneOffice Duet360™
for Epicor**

Partners Since: 2020

“OneOffice Duet360™ is the right solution for our integration plan and future expectations. The out-of-the-box architecture significantly increased the speed of the implementation and the quality of the deliverable.”

*Laura Cristea,
Enterprise Systems Analyst*

Building Trusted Industry Partnerships

Ontario-based Northern Digital Inc. (NDI) has delivered products and services to the medical industry for nearly 40 years. In partnership with trusted OEMs, the company has pioneered advanced spatial measurement solutions to improve computer-assisted medical procedures and outcomes. Product innovation has led to developing the Polaris optical measurement systems, and the Aurora and 3D Guidance electromagnetic tracking systems. NDI serves markets including but not limited to medical devices, simulation, and medical research.

Business Processes Improved with Technical Expertise

The Enterprise Systems department of NDI directs the company’s global applications such as Epicor ERP and Salesforce CRM. They are tasked with integrating front and back-office applications to deliver cohesive solutions. In 2018, NDI discontinued using their CRM tool due to poorly defined requirements, a lack of user adoption, and a poor integration experience.

Tools supporting Sales and Marketing, customer support case management, and 360-degree customer transparency were essential. “We chose to start over and needed partners who could understand our business, provide technical leadership, and maintain a strong relationship with our company,” says Enterprise Systems Analyst Laura Cristea. The vendor selection process resulted in partnering with Salesforce CRM to replace the previous CRM solution. A subsequent implementation partner selection process was run which resulted in forming the partnership with Endowance Solutions.

Phased Project Approach Designed for Success

NDI’s strategy was a phased project implementation. Phase 1 focused on delivering Salesforce lead, contact, and opportunity management functionality. In Phase 2, implementing the Customer Support Site leveraged the Salesforce Digital Experience to replace an older, in-house developed solution that could not scale to support a growing customer base.

The Customer Community support site is a key step toward increasing customer satisfaction. “The most useful capabilities are activity management for capturing customer interactions and case submission

for registration and product support,” stated Sylvie Piercy, Manager, Enterprise Systems.

“Our vision from the beginning was to take our support site to the next level. Working with Endowance has enhanced the site’s accessibility providing a more in-depth customer interaction.”

NDI then moved to Phase 3, Salesforce integration with Epicor ERP. “OneOffice Duet360™ is the right solution for our integration plan and future expectations. The out-of-the-box architecture significantly increased the speed of the implementation and the quality of the deliverable. The flexibility of one or bi-directional data sync was also important,” stated Cristea. The support team can track a product’s history by serial number, through the sales process, directly in Salesforce. The company can automate the management of the instrument rental program for a better customer experience. The foundation has been laid for a future self-serve platform.

“We appreciate how well Endowance takes feedback. Our interactions are positive and fluid. The NDI team felt heard. Endowance’s in-depth knowledge, both technical and in our business’s nuances, gave the team confidence they make a great partner for the long term.”

Laura Cristea,
Enterprise Systems Analyst

Salesforce CRM integration with Duet360 has yielded success for NDI and for their customers. “The solution is used globally for all NDI locations including Germany and China,” reports Cristea. “Guidelines are in place for capturing customer inquiries and cases. The registration process is user-friendly. Our customers are giving the new solution positive reviews.”

Clear Communication Leads to Long Term Customer Success

Communication has proven to be the key success factor in the partnership between NDI and Endowance Solutions.

“We appreciate how well Endowance takes feedback,” says Cristea. “Our interactions are positive and fluid. The NDI team felt heard. Endowance’s in-depth knowledge, both technical and in our business’s nuances, gave the team confidence they make a great partner for the long term.”

The goal of the next phase is to take greater advantage of the Salesforce and Epicor integration with OneOffice Duet360.