A customized solution

How Integrev's unique approach to Salesforce customization solved Particle Health's customer relationship management challenges

SITUATION

Particle Health aims to improve patient care by enabling simple and secure access to actionable healthcare data for digital innovators. The company executes this mission by focusing on breaking down data silos and dismantling the complexities of traditional healthcare integrations, which enables provider services, pharma, and virtual-first companies to get access to the whole patient story.

Even though Particle Health can use its API platform to distill more than 320 million medical records into actionable data products, it faced issues when dealing with its own customer relationship management (CRM) platform.

"We were using Zoho for our CRM," said AJ Audino, Director of Sales Operations. "The problem was that we didn't properly optimize Zoho to be leveraged throughout the company. We just used it right out of the box, and that wasn't working very well for us."

Needing a more robust CRM that was customized to the company's precise needs, Particle Health decided to transition to Salesforce. However, AJ's team needed help getting Salesforce optimized for their needs.

"We knew that Salesforce was a much more powerful tool, but it was much harder to customize," said AJ. "We simply didn't have the depth and breadth of Salesforce experience to handle the customization unassisted. During our research phase, we spoke with at least six different Salesforce implementation vendors. In the end, Integrev proved to be the best option."

"I absolutely recommend the Integrev team. They aren't just an implementation vendor that only cares about Salesforce. They genuinely want to understand your business to get good at being a partner from ideation to implementation to rollout."

AJ AUDINO, Director of Sales Operations of Particle Health

WWW.INTEGREV.COM

A customized solution

How Integrev's unique approach to Salesforce customization solved Particle Health's customer relationship management challenges

SOLUTION

AJ selected Integrev because it focuses exclusively on helping companies grow their business using best practices in scaling systems, processes, and teams by bridging the gap between strategy and technology. For Particle Health, that meant helping AJ's team think through various data structures, integrations, and automation issues before the technical implementation of Salesforce.

"One of the things we really liked about working with the Integrev team is that they didn't come with a cookie-cutter approach," said AJ. "They wanted to understand our broader business, what we were selling, our go-to-market strategy, and all of the tools we were using. In fact, the first few times we met with them, we didn't even talk about Salesforce."

Armed with a wealth of knowledge about Particle Health's business, the Integrev team implemented Salesforce Sales Cloud with a web-to-lead and email-to-case integration. This included opportunity pipeline management as well as automated field completion across objects, automatic contract creation and renewals, and automated survey sends. Integrev also integrated HubSpot with Salesforce.

"The implementation was very organized," said AJ. "We started with the sales function, then moved on to the customer success function. After a bit of testing and improvements, we now have a really smooth operating transition from marketing to sales to customer success."

A look at the results

EASIER PIPELINE MANAGEMENT

"The hand-off between teams used to be a bit disjointed. Managing the transition between marketing, sales, and customer service processes is now a lot smoother," said AJ. "Everything is more transparent. We're able to act as a cross-functional team that can view data and act on it."

GREATER OPERATIONAL EFFICIENCY

"Because of the way our Salesforce instance was implemented, our time using HubSpot and Salesforce is spent more efficiently," said AJ. "Overall, because of the improved efficiency, we have been able to grow from five to more than twenty Salesforce users."

IMPROVED REPORTING CAPABILITIES

"We capture a lot of data, and we were drowning with Zoho," said AJ. "Now, it is much easier for us to visualize, understand, and report on that data thanks to our customized dashboards."