

# Streamlined for success

How WINFertility achieved remarkable sales growth with Integrev's Salesforce customization

## SITUATION

Originally founded as an independent women's health management company, WINFertility has been the national leader in managed fertility benefits for nearly three decades. More than twenty-five years of experience and data-driven protocols have allowed the company to help over one hundred thousand patients achieve parenthood.

When chief commercial officer Peter Nieves arrived at the company, WINFertility didn't effectively use technology to assist with its marketing efforts and manage its sales pipeline. The company had invested in Salesforce and worked with an implementation consultant.

However, a year later, it still wasn't getting sufficient value out of that investment.

"We were outsourcing a large portion of our qualified lead development to virtual initiators," said Peter. "That made things a bit complicated. We needed those virtual initiators to have access to curated call lists, with Salesforce being a centralized repository for those leads. Not having this and related capabilities significantly limited our ability to grow the company."

WINFertility then turned to Integrev for assistance with harmonizing third-party resources and internal resources in Salesforce so the small internal sales team would have the support they needed.

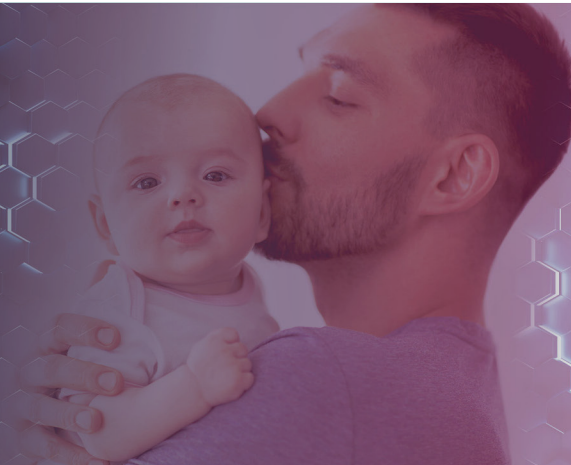


"The Integrev team is a smart group of people who are great to work with. They are efficient, and their service is cost-effective."

PETER NIEVES, Chief Commercial Officer of WINFertility

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## SOLUTION

Integrev 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 WINFertility, that meant customizing the organization's Salesforce installation to effectively integrate its external and internal sales efforts.

"For us, customization meant incorporating the input from our third-party virtual initiators into Salesforce and then scoring those opportunities based on multiple sources of information so they were properly prioritized for calling," said Peter. "Integrev helped us enable this functionality within Salesforce."

Integrev also built detailed workflows and automations that helped accommodate the work of the virtual initiators. All of this meant that the internal sales team owned the inputted information that was ultimately pushed out to stakeholders for either inclusion in the automated email or telephone marketing campaigns.

## A look at the results

### IMPROVED SALES RESULTS

"We definitely have greater sales efficiency, and that translates into greater sales results," said Peter. "We've been doubling sales for each of the past four years."

### GREATER RETURN ON THIRD-PARTY SPEND

"Thanks to Integrev's help, we have a better relationship with our third-party virtual initiators," said Peter. "That has resulted in a good return on our spending with them. That's a big deal."

### IMPRESSIVE GROWTH

"Integrev helped us grow our business by helping us make good use of our vendors and ultimately streamline the sales process in many ways," said Peter.

### IMPROVED RECRUITING AND RETENTION

"What Integrev has done for us has also helped us with recruiting and retaining our internal sales team," said Peter. "Team members and candidates alike are impressed with the sophisticated ways we use Salesforce."