

ADS APPEXCHANGE CASE STUDY

American Dental Society practice brokers create a private AppExchange solution to modernize their systems and automate processes using Salesforce.com.



ADS brokers are firms that specialize in dental practice appraisals, brokerage and sales services to dental practitioners at every stage of their professional careers. There are 26 ADS brokers in the United States. ADS Texas was the first to implement Salesforce.com and helped to pave the way by allowing their customizations to be used in a shared package that about half of the brokers are using today. The package allows for easy integration with websites and has continued to be improved and enhanced, including support for Medical and Veterinary practice brokers.

Success Stats

35%
increase in user productivity

25%
increase in sales/revenue

50%
increase in revenue forecasting accuracy

Challenges:

- Centralize data and automate business processes.
- Integrate with websites, email, and other systems to improve data across systems and reduce manual entry.
- Provide better insight into leads and opportunities.
- Create a system that all ADS Brokers can use and take advantage of features on the Salesforce.com platform.

KMS Impacts:



Customized Salesforce.com to fit the needs of ADS Texas and created an AppExchange package that greatly reduced the cost for other ADS Brokers to implement Salesforce.com.



Automations were created for new leads and accounts to create profiles, sign agreements, and receive notifications for new listings and opportunities that they are interested in.



Custom integrations were built and made available to all Brokers to keep listing data synced between Salesforce and external websites, making Salesforce.com the hub for data entry, reporting, etc.



Salesforce.com Leads and Opportunities were customized to track all the necessary data for sellers and their listings, potential buyers, types of practices the buyers are interested in, etc.



Reports & Dashboards were created to improve business intelligence and make the data actionable.



With KMS' help, Salesforce has been a great tool for us and has allowed our business to grow by making our users more productive through process automation. It integrates with our marketing platform and website to make managing leads and campaigns easier, which has led to more deals.

— President of ADS Texas

salesforce Clouds:



Sales

salesforce

appexchange

Other Technologies Used:

