



Transforming Patient Onboarding and Referral Management with Salesforce at Defy Medical

Project Overview

Defy Medical partnered with TRooTech to engineer a unified, secure, and scalable Salesforce ecosystem tailored for patient-centric operations. The goal was to eliminate manual workflows, ensure HIPAA-compliant onboarding, and create a robust referral engine tied to patient acquisition and engagement. By integrating Salesforce with platforms like Persona, AMD, and Magento, TRooTech enabled Defy Medical to synchronize patient data across the funnel, automate lead routing, and prepare for a high-volume referral system—positioning the organization for next-level operational agility and revenue expansion.

Strategies In Action

Persona-Driven Identity Verification:
Integrated Salesforce with Persona for secure, compliant patient ID verification during onboarding.

Dynamic Round-Robin Lead Assignment:
Built a lead distribution engine inside Salesforce, factoring rep availability and work schedules.

Multi-Platform Sync for Conversions:
Enabled real-time data flow across AMD (medical records) and Magento (eCommerce) for a seamless patient journey.

Referral System Automation (Underway):
Developing real-time referral tracking, unique patient codes, automated signup detection, and reward credit issuance.

Major Challenges

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One of the biggest challenges was replacing an outdated, manually operated referral workflow with a real-time, rules-driven engine—without disrupting live operations. Additionally, aligning data schemas between Magento, AMD, and Salesforce required extensive API orchestration. Building logic for flexible, role-based lead distribution also posed complexity due to dynamic availability rules across teams.

Our Solution

- ✔ Integrated Salesforce with Persona for secure, automated patient identity verification
- ✔ Developed dynamic round-robin lead distribution based on rep availability
- ✔ Built an automated patient conversion workflow synced with AMD and Magento
- ✔ Engineered a digital referral system to replace manual, error-prone processes
- ✔ Enabled unique referral code generation for seamless sharing across channels
- ✔ Connected the referral system with patient signup flow to auto-capture leads
- ✔ Initiated real-time referral credit tracking to boost internal efficiency

Main Features

Salesforce + Persona Integration For Secure Patient Verification

Dynamic Lead Routing Using Availability-Based Round-Robin Logic

End-To-End Patient Conversion Workflow With Multi-System Sync

Automated Referral Management (Under Development)

Personalized Referral Links & Codes Generation

Referral Signup Capture Integrated Into Patient Onboarding

Real-Time Referral Credit Issuance To Boost Engagement

Technology Stack

- Salesforce : CRM, Persona
- E-Commerce : Magento
- API : Custom API

Stake Holders

- Functional teams across
 - Prospective Patients
 - Referring Individuals
 - Internal Sales & Support Teams

