

Unifying CRM and ERP Systems for a Healthcare SaaS Provider

A Case Study

A fast-growing Software as a Service (SaaS) provider in the healthcare and life sciences industry, specializing in medical billing solutions, was undergoing a major acquisition. The merger brought together two organizations with separate Customer Resource Management (CRM) and Enterprise Resource Planning (ERP) systems. To support scalable growth, ensure regulatory compliance, and deliver a seamless customer experience across sales, service, and finance, the executive team sought to unify their technology stack. The result would be an enhanced forecasting, billing, and customer experience for all users.

CLIENT:

SaaS provider in the healthcare and life sciences industry

CLIENT'S GOALS:

The client sought to unify systems to scale growth, improve forecasting, and deliver a seamless customer experience.

OUR TEAM'S ROLE:

Our team led the end-to-end transformation, guiding the CRM and ERP consolidation, designing integrated lead-to-cash workflows, and ensuring seamless data governance and system interoperability.

01

Challenges

- Separate Salesforce organizations and ERP platforms caused inefficiencies in reporting, forecasting, and billing.
- Lack of a unified data source led to delays and service inconsistencies.
- Disparate workflows resulted in revenue leakage and unreliable forecasting.
- Missing backup and archiving tools exposed the business to data loss and retention policy violations.

02

Citrin Cooperman's Approach

- Consolidated CRM environments to align lead, opportunity, and service processes.
- Deployed Sales Cloud, Service Cloud, CPQ, Knowledge, and Experience Cloud for end-to-end process support.
- Consolidated financial operations on NetSuite with real-time syncing via Boomi.
- Enabled automated recovery and compliant archiving with OwnBackup and Own Archiver.

03

Results

- Unified CRM and ERP enabled consistent quoting, faster billing, and better revenue recognition.
- Salesforce-NetSuite integration sped up financial closings by reducing manual work.
- Standardized forecasts improved pipeline visibility for leadership.
- Automated backups, data archiving, and a 360° view boosted compliance and customer experience.