

Care Services – Building a Scalable Salesforce Backbone

Client Overview

A Care Services plays a vital role in healthcare logistics, coordinating urgent medication delivery to long-term care and correctional facilities through a network of **70,000+ pharmacies and couriers**. With a growing service offering and a mission to ensure patient access and operational efficiency, Salesforce was a natural cornerstone for their business systems.

Industry

Healthcare Logistics

Company Size

100+ employees

Engagement Type

Ongoing Managed Services

The Turning Point

Challenge

As Care Services expanded, so did the need for agility and automation in Salesforce. Without a dedicated admin, internal teams were stretched managing system maintenance alongside other responsibilities.

Solution

To ensure Salesforce evolved in sync with the business, they partnered with **Equals II** — opting for a managed services model that provided both flexibility and expert guidance.

Equals II's Solution

Equals II delivers a hybrid support model, combining ticket-based delivery with proactive planning. We support everything from admin tasks and enhancements to automation design, platform upgrades, and training. Our offshore team works closely with the client through weekly calls, email escalations, and a shared task board — giving them real-time visibility into priorities and progress.



Customer Onboarding Automation

A custom web-to-Salesforce enrollment form drastically reduced onboarding time.



Contract Process Revamp

Multi-day contracting was replaced with a fast, automated workflow completed in minutes.



System Optimization

We cleaned up legacy data, improved performance, and eliminated unnecessary storage costs.



Proactive Technical Management

Deprecated features were replaced ahead of platform deadlines to avoid disruption.

User Enablement & Collaboration

Our team supported user enablement by running targeted sessions for sales and account teams, streamlining workflows, and improving usability. With clearer processes and faster execution, users now operate more confidently within Salesforce.

Efficiency

Key workflows such as contract generation and data intake now take minutes, not days.

Cost Savings

Storage tier was downgraded after strategic data cleanup.

Operational Confidence

The team now uses Salesforce as a source of truth for decision-making.

Client Satisfaction

Engagements are consistently renewed, with growing scope and hours.

Client testimonials

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“You’re not just executing tickets — you’re helping us think through the right way to do it.”
— **Shawn Edwards, CIO**

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— **Care Services Leadership Team**



Flexibility

Scale support as needed



Responsiveness

Addressing urgent needs



Cost-efficiency

Through offshore delivery



Quality

Rivals full-time internal teams

Conclusion

Whether it's resolving high-priority issues, launching new workflows, or guiding system improvements, Equals II functions as an extension of their internal team — delivering big impact within a lean model.

