

Advising a Healthcare Diagnostics Team on Optimizing its Sales and Inventory Processes



This global healthcare organization is a leader in in-vitro diagnostics. Operating in more than 100 countries, they discover and develop medicines and diagnostics to improve and save the lives of people worldwide. Their diagnostics division develops diagnostic tests, instruments, and digital solutions.

The challenge: Too many systems take too much time

The healthcare organization's diagnostics sales team used a variety of tools and resources to manage the forecasting and reporting of sales opportunities, revenue forecasts, and related manufacturing and inventory requirements. Information was spread out across various teams and units, making it difficult to have a comprehensive view of the business. The team was spending less time driving sales strategy and more time shuffling spreadsheets.

As a result, customer experience and satisfaction were suffering. Since manufacturing didn't have an accurate picture of upcoming demand, product production sometimes lagged, leading to allocation and backorders.

The organization's sales reps, planners, and managers were frustrated by the sales and inventory forecasting processes, including:

- The lack of a company-wide structure around a consistent sales process resulted in each division doing it a different way
- The time-consuming manual maintenance to find, copy/paste, validate, and input sales and forecasting data
- "Swivel-chairing" between too many systems, files, and email attachments to piece together a complete sales forecast
- The inability to access accurate historical data around a customer's buying patterns led to inventory issues such as product allocation and backorders

The results: Incorporating recommendations for future success

Silverline's solution took Salesforce's tools and features and leveraged them to meet the unique needs of the organization's sales team. It laid the groundwork for more robust sales and inventory functionality in these critical areas:

- **Increasing integration of data sources:** The healthcare organization is creating better sales workflows by centralizing disparate information into Salesforce. By integrating Salesforce's revenue recognition reporting, it can capture all inventory needs and forecasting without needing to "swivel-chair" between systems.
- **Enhancing communication and collaboration:** Silverline's communication plan reinforces the notion "if it's not in Salesforce, it's not real" to keep all emails and other documents within the system. Teams can share updates, retrieve data from Salesforce, and update the next steps in one central platform with all departments who are contributing to a deal.
- **Accelerating machine learning and artificial intelligence:** More advanced Salesforce capabilities for machine learning and AI allow the sales team to look at past deals to predict future selling and inventory behavior. The system picks up on changes in Salesforce records and alerts appropriate users with tactical summaries to help sales teams meet their quotas.

The healthcare organization is working on shaping the future state of its sales and inventory forecasting processes by implementing Silverline's recommendations.

The solution: Analyzing from all angles

This company wanted to engage key internal stakeholders in the solution creation process, and with a Salesforce Envision engagement, they could take a human-centered approach that would increase innovation and adoption.

As a certified Salesforce partner, Silverline was brought in to identify the healthcare organization's sales challenges and provide recommendations to address those specific problems.

Silverline conducted a thorough review of the organization's sales processes that included:

- **Gathering business and user insights through one-on-one interviews:** In-depth contextual interviews with stakeholders, SMEs, customers, and partners focused on the pros and cons of the current forecasting process and the impact they have on each person's role.
- **Aligning key themes and solutions through co-creation workshops:** The information from the interviews was synthesized together at collaborative working sessions, and Silverline identified underlying patterns around the pain points.
- **Creating a solution blueprint and foundation for continued communication:** Silverline delivered a roadmap that addressed the organization's challenges and established a vision for the path forward. It ensured the plan was technically feasible and vetted by actual users.

The project was directly informed and co-owned by the end users through every stage of the process, and Silverline's work, in addition to producing a tangible artifact, also provided valuable opportunities for the team to hear from one another in ways they hadn't before.

About Silverline

Silverline leverages insight acquired through thousands of engagements along with real-world expertise gained across the Financial Services industry, including: banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. From strategy and implementation to managed services, we guide clients through every phase of their journey — enabling continuous value with the Salesforce platform. To learn more visit: <https://silverlinecrm.com/financial-services/>



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