GLOBAL CONTRACT RESEARCH ORGANIZATION

EVOLVES WITH BETTER BUSINESS TECHNOLOGIES

THE COMPANY

This decades-old Global Contract Research Organization was founded on a vision to help pharmaceutical, biotech, and medical device companies make scientifically sound decisions. The company has since grown into an innovative partner organization with roughly 50 employees that provide consulting, analytics, and manufacturing services to their clients in the chemical manufacturing, pharmaceutical, medical device, and biotech industries.

THE PROBLEM

Unsophisticated Technologies, Inefficient Project Management & Lack of Workflow Insight

In the last two decades, the company experienced an exponential amount of growth and needed to improve their technologies in order to keep up with their maturing processes. The team was using makeshift systems of disparate tools in place of a comprehensive platform. Data was plentiful but scattered. Project management tools couldn't track information or workflows. Customer relationships were difficult to maintain without a CRM system. Despite their thorough, organized, and extremely effective business processes, they wasted a lot of time and effort manually tracking, updating, and reporting on information.

COMPANY TYPE
Global Contract Research Organization & Full-Service Research Partner

SIZE
45 - 50 employees

TECHNOLOGY STACK: BEFORE BRAINSELL
The Vault, MS Office Suite & Outlook

TECHNOLOGY STACK: AFTER BRAINSELL
Sugar Sell, Customer Journey Plugin, MS Office Suite & Outlook

Their document management system was not suited for their growing customer relationship management needs.

Due to their hard work, tight workflows, and dedication to exceptional service, this company had (and still has) solid customer relationships. However, they were using Microsoft Excel and Word documents, Outlook, and a document management system called The Vault to track and maintain client information and interactions as well as projects and sales opportunities. This web of applications fulfilled some workflow and customer relationship management needs, but it was not a robust platform that could handle the sophistication of their processes or volume of clients.

They needed a comprehensive CRM solution as a central repository. They also needed that solution to integrate well with Outlook, Constant Contact, and several other business software tools they depended on. On top of this, the company was concerned about privacy and security since sensitive data in Excel and Word documents sat unsecured in their document management system.

FROM THE SOURCE:

"We got to a point of growth where it was time for a CRM. We wanted a centralized system where we could expand on what we were doing in the old one, but also add CRM functionalities and integrate it with other tools."

– Operations Manager

Their lack of insight on workflow processes impacted project management practices.

Project management is a key component of the company's processes. Projects often go through several iterations of updates and signoffs from multiple internal and external parties, as dictated by their standardized workflow processes. This sophisticated system of workflows – which was the result of a nearly 6-month long business process analysis project with directors and managers – lived inside The Vault in the form of documents.

The company relied heavily on Microsoft Excel as a project management and data warehouse tool, but the platform was inefficient and not easily customizable. This tied into another challenge: tracking and reporting on workflows. Without insight on their workflows, they had a hard time gathering the right information needed to improve project management practices.

A Customized CRM Ecosystem & Training Resources for
Continued Product Education

To help them address their growing pains, the company searched for a consulting and implementation service provider. After finding a helpful product comparison guide, they partnered with BrainSell to implement Sugar Sell as its CRM. Together, BrainSell and the company completed several business process and workflow mapping consultations, product demonstrations, customization and implementation projects, and training and support initiatives.

For complex operational processes and sophisticated business needs, customization is the key.

First, BrainSell helped develop multiple advanced workflows within Sugar Sell, the contract research company's new CRM system. They worked together to capture their complex business processes – from tracking lab testing, to managing manufacture approvals, to shipping and service delivery. Then, the workflows were customized to meet the company's needs. In the chemical manufacturing world, sales information is sensitive and business relationships are elaborate. Customer projects, called "programs," can take years to complete and involve dozens of different organizations, so customization is important.

FAVORITE FEATURE:
Dashboards

"Dashboards are really helpful. The ability of everyone to see the same set of information is invaluable. We have a dynamic representation of our contacts and programs now."

– Operations Manager

BrainSell custom-built parts of Sugar Sell to help the company manage programs and centralize client information. BrainSell also created custom fields – including date fields, book dates, and check-box fields – and automatic triggers for them. For example, some fields trigger a request for a sign-off by a team member who is required to supervise a laboratory procedure. The next step in the workflow cannot be completed without the sign-off. BrainSell also built automatic triggers for various tasks whenever a document (i.e. contract, checklist, formulas, etc.) is created, named or linked to within Sugar Sell.

Expert guidance helped align team goals and ensured user adoption.

Solutions aren't complete with just a new tool – they require education of staff members about best business practices around their new technologies and product training for user adoption. The company's team is unique – they're especially dedicated to learning and growing as individuals as well as an organization. One of their goals was to learn to develop in the back end of Sugar Sell so they can customize it in the future. Therefore, BrainSell took a train-the-trainer approach to post-implementation support services. BrainSell made on-site visits and became a valuable resource for the company through technical support, staff training, and extra service hours for additional consultations and development. They now have a skillset that helps them maintain their technology stack and continue to thrive.

FAVORITE FEATURE:
Advanced Workflow

"As a company that does a lot of our own development and custom work, Advanced Workflow has really helped us with our programming efforts. The fact that almost every function in Advanced Workflow is exposed externally through a standard interface means we can pick and choose what to work on within Sugar versus outside of it."

– Operations Manager

THE RESULTS

Huge Improvement in
Operational Efficiency & Business Insight

Following a collaborative and carefully managed implementation, the company was able to launch Sugar Sell in approximately six months. The solution helped the company create a central repository for key business data. They now use less resources and rely more on accurate and curated client information. BrainSell continues to serve as a consultative resource, providing objective advice and support as the company further expands their business to meet clients' unique needs.

Their technology stack around Sugar Sell is accessible, integrated, and chock-full of insightful data.

For a small yet hearty organization, the results affected a small number of employees but greatly improved operational efficiency. The first thing they noticed was that the hand-off of information between internal team members was much easier and faster. Integration plays a large role in this, making data aggregation much less time-consuming. They no longer manually input information into siloed systems like Word, Excel, and Outlook and then transfer that data between systems. Now, when they create accounts or contacts in Outlook, write up contracts or proposals in Word, or manage line items in Excel, all that meta data collects in Sugar Sell and is accessible to everyone in real-time.

The other major result of this new technology stack is business insight. Their newfound ability to report on and analyze their business processes and generate monthly reports affords them opportunity to derive meaningful data on their performance and use it to improve the entire organization.

brainsell

About BrainSell

BrainSell helps companies thrive by solving business challenges with expert guidance and best-of-class technology. We have offered unbiased software selection, implementation, support, and consulting services to clients of all sizes across North America for over 25 years.

Our methodology involves helping clients identify the clearest areas for potential improvement in their processes. If technology can help you, then the BrainSell team can guide you on your path to business growth.

Looking for CRM, ERP or Accounting Technologies?
Contact us to learn more!

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