

Carestack sees uptake of 47% on closer rate after adding Convin's Conversation Intelligence in their sales stack.

Headquarters Orlando, FL **Founded** 2012 **Company size** 201-500 employees **Industry** SaaS - Health and Fitness

Carestack is an Orlando-based practice management SaaS solution company that was in the process of surveying solutions to adopt AI for improving the efficiency of its sales processes. Carestack saw that because of the large call volume, they couldn't keep beat with the call review process and were unable to uncover or pinpoint the challenges of their sales executives, or track sales methodology, or even understand customers' pain points at a deeper level. Convin enabled automated call tracking, analysis and reporting to uncover real customers, people, and competitive intelligence for improving Carestack's sales processes.

Take away:



60% view time increased for marketing videos based on Convin's customer intelligence.

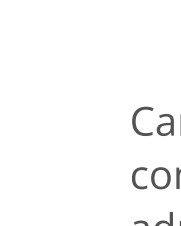


47% increase in deal uptake.



Sales coaching time **decreased to fractions.**

About Carestack



Convin has helped our sales team with better follow-up. More importantly, we have been using the tool to discover what prospects are talking about to steer our conversations and marketing efforts.

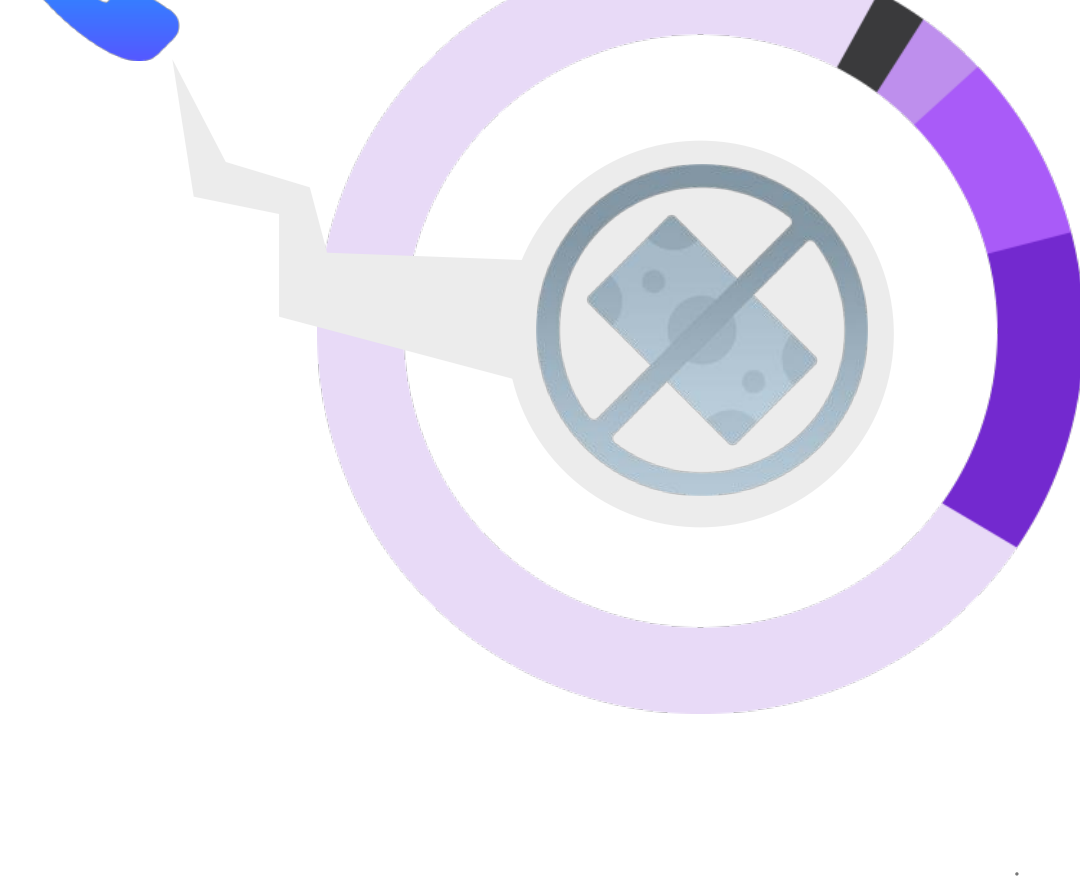
- Dan Hall, Director sales, Carestack.

Carestack is an Orlando, Florida-based SaaS dental software company, which helps dental clinics in scheduling, clinical administration, billing, patient engagement, and reporting for single clinics or large multi-site DSO.

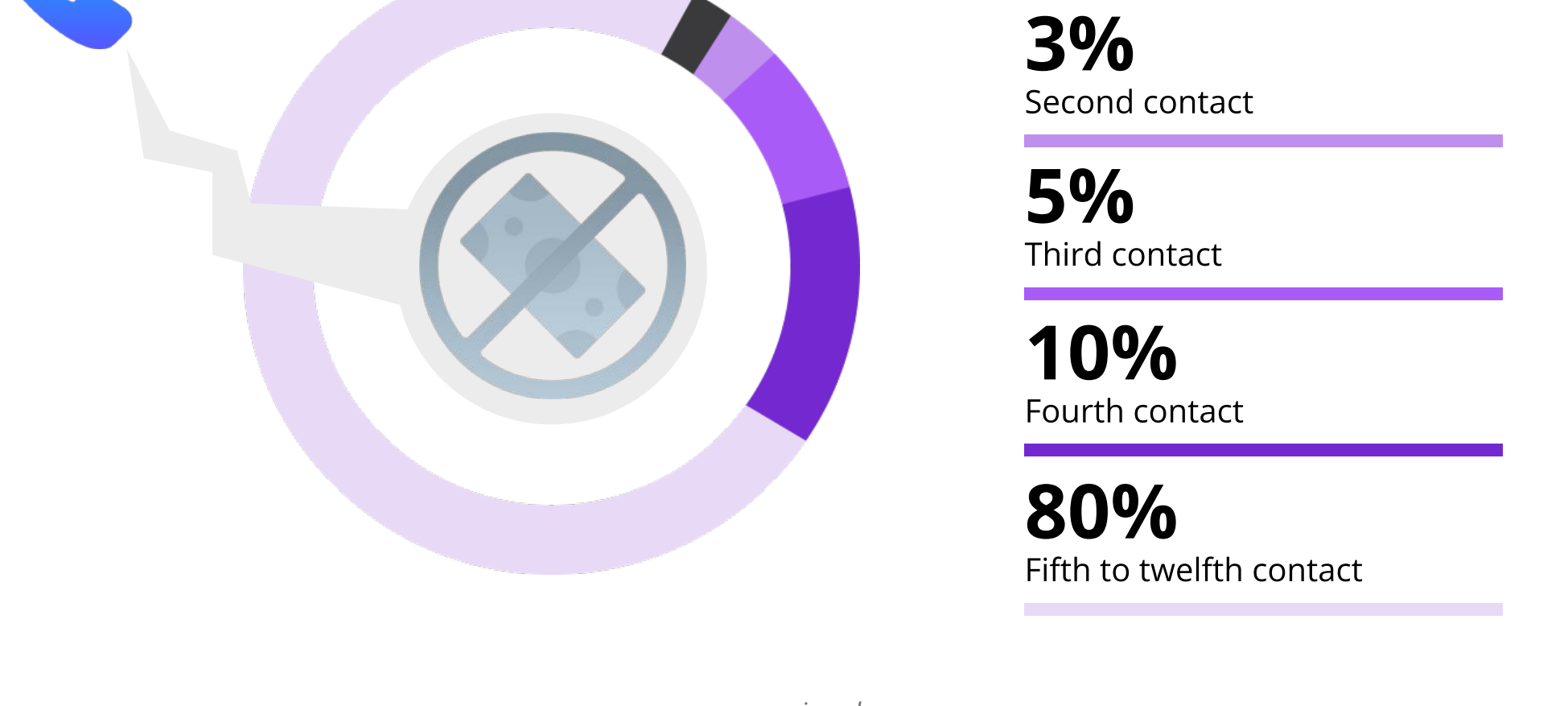
Carestack was established in the year 2015 by Dr. Mark Huzyak and Abhi Krishna after Mark realized the need for a centralized solution for automating dental clinics administration and reporting while practicing himself.

Under the Carestack care umbrella, there are Midwest Dental's 230 offices, Plum Dental's 17 offices, and many more. Carestack has also won many awards for its exceptional contribution to the industry like G2 High Performer 2021, SMB 10 2021, etc.

Market Opportunity



source: ircsales



You can see a certain number of sales being made in every call from the above data, but what does this mean?

You can't expect to have made sales in the first call itself. Here sales mean extracting crucial customer information and revenue intelligence from every follow-up call and using it to increase the deal value.

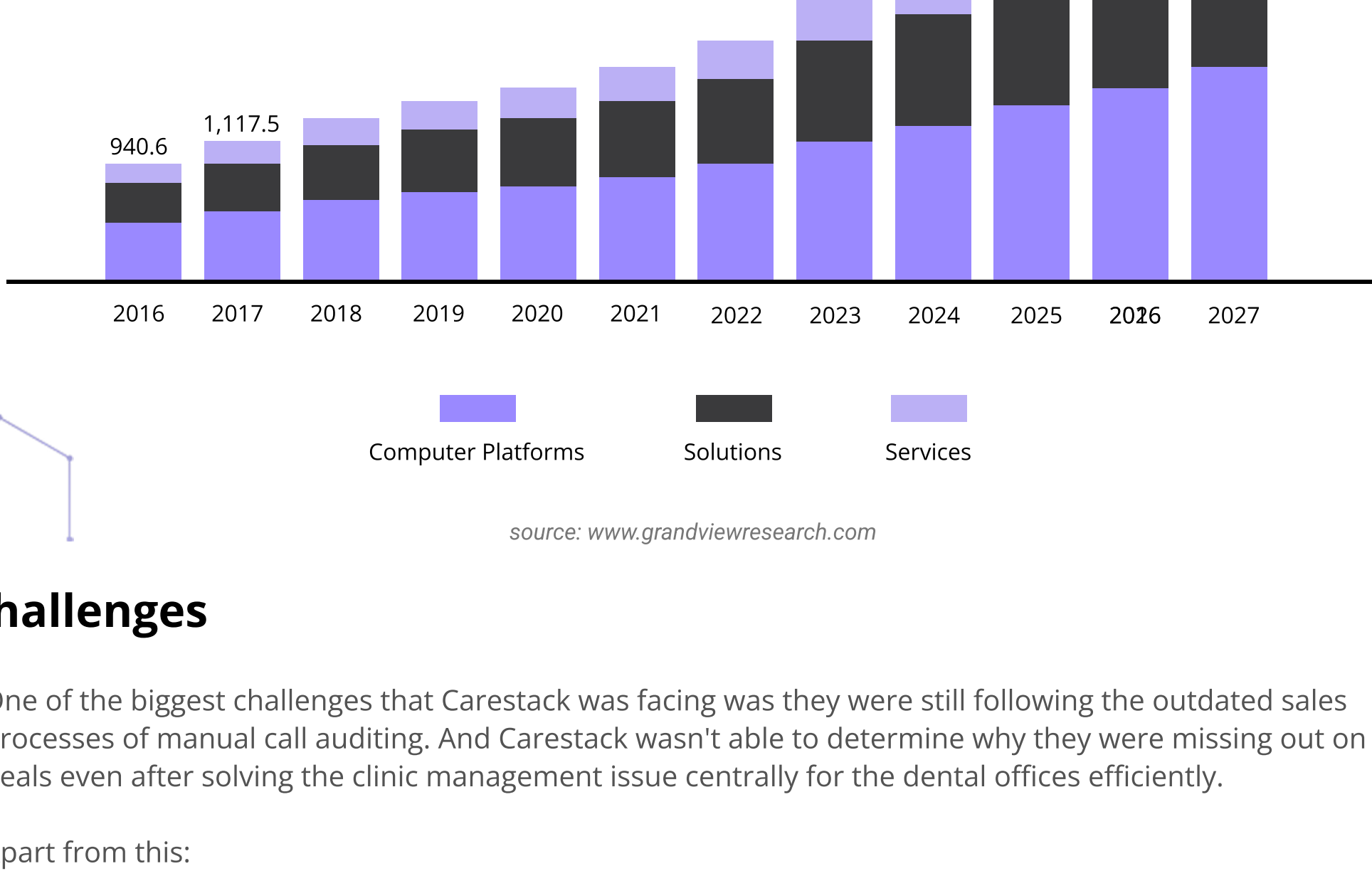
Now let me tell you another interesting fact: there are more than 14,000 dental clinics in Florida and more than 1 million dental offices across the USA alone.

Now that's the end of the news; to attain quota and stay in the market, a sales rep has to make at least 80-100 calls a day, apart from the follow-up calls.

Applying the above data to Carestack, to reach a potential customer, Carestack has to make multiple calls a day with fewer resources to hundreds and hundreds of people in these dental offices. But it had no or literally limited ways of extracting crucial revenue intelligence and deal intelligence from their sales calls (Remember the graph above?).

It is not just the issue with the practice management industry but with every growing industry, especially because of the pandemic.

Pandemic has led to an increase in the adoption of SaaS solutions that can extract crucial data and audit the customer's conversation, as we can see from the Grand view research graph below.



Challenges

One of the biggest challenges that Carestack was facing was they were still following the outdated sales processes of manual call auditing. And Carestack wasn't able to determine why they were missing out on deals even after solving the clinic management issue centrally for the dental offices efficiently.

Apart from this:

1. No means of extracting customer intelligence

Even though Carestack had so many calls in a day with potential prospects and prospects, it could not uncover **customer intelligence like their pain points**, needs, or intent of connecting (for the inbound team) and using it for their marketing and follow up calls

2. Missing data on sales objections and sales challenges

Another challenge that Carestack was facing, as we said earlier, was that it could not understand the reasons for a qualifiable deal drop-off or why some account executives were performing better. Or in other words, what were the sales challenges and sales objections that the account executives were facing, and how the top-performing account executives were facing them.

3. Reviewing sales process - Sandler's sales methodology.

Carestack follows Sandler's sales methodology, which emphasizes customer qualification and relationship-building, which accentuates sales professionals building an advisor relationship with the customer.

But it had no way of verifying if their sales team was following this methodology and utilizing the resources in the demo and discovery calls.

So what did they do?

They started exploring tools that would record their sales calls and track if the Carestack team is following Sandler's sales methodology.

How did Carestack find Convin?

We at Convin were in the process of identifying potential customers and reaching out to them. We also approached Carestack.

Dan, the Sales Director, was also exploring solutions that could have all the high-end features while being at the same time fair in pricing. He wanted to automate the sales process for better efficiency and tracking. Most solutions in the market were a good fit for huge multinational companies but not suitable for small to medium-sized companies.

Convin offers all high-end conversation intelligence features and more at a fair price.

Within a **week** of reaching out to Carestack, Convin was a member of Carestack's sales stack. Literally, the **onboarding** of the solution was done in just a **day**.

Integration

For seamless automated sales processes, Convin was integrated with Carestack's sales stack seamlessly automated sales processes.

Google Calendar: Convin was integrated with the Google Calendar-- the calendar used by Carestack. This integration was done in order to connect Convin's meeting recording bot with the meeting link in the calendar meeting.

Hubspot: Carestack uses Hubspot to keep track of its sales processes and leads. Convin was integrated with Hubspot to automate the CRM updating with call details, call notes and call recording for easy tracking of deals.

Zoom: This is one of the platforms leveraged by Carestack for engaging with their prospects. That is why Convin is integrated with their Zoom account for easy recording, transcribing, and analyzing all Zoom's meetings.

Google Meet: Carestack team also leverages Google Meet to connect with their potential prospects. That is why Convin is integrated with their Google meet account for easy recording, transcribing, and analyzing Google Meets meetings.

Apart from this, Convin's extension allows Carestack to record any Google and Zoom meetings, even if the account is not signed up with Convin.

By the way, did we tell you that Carestack started leveraging the benefits of Convin from day one?



Training did not take long at all as we implemented and started using right away and did some learning along the way.

- Dan Hall, Director sales, Carestack.

Results

Customer Intelligence				
ALL TEAMS				
ALL				
ABOVE 5 MIN				
LAST 30 DAYS				
Export				
FEATURES COMPETITION SALES TERMS				
Features Phase				
		# of Occurrence	# of Calls	
Analytics		579	180 (43%)	SNIPPETS
Treatment Planning		979	184 (44%)	SNIPPETS
Training		942	189 (45%)	SNIPPETS
Support		620	92 (22%)	SNIPPETS
Patient Portal		1024	218 (52%)	SNIPPETS
Online appointment booking		117	206 (50%)	SNIPPETS

1. Better sales call notes.

Convin post-recording Carestack's calls, transcribes and adds the notes in the Hubspot CRM, which resulted in improving the quality of the notes. Also, it allowed Carestack's sales team to go from demo to demo, knowing they have the Convin notes and can search the meeting for keywords to follow up on.

2. Sandler's sales methodology sales tracking

As we saw earlier, Carestack follows Sandler's sales methodology but lacks a system of tracking if their sales team was actually following the methodology.

Convin meeting recordings changed this. Now they are able to track what is being spoken in the call and how their account executives are approaching and engaging with the prospects. It even revealed the **sales challenges** that their account executives were facing

3. Unlimited and Real Customer Intelligence

Another challenge, as we saw earlier, Carestack didn't have the capability to learn the **customer's pain points** or verify if they had missed any opportunity. As manual note-taking is unreliable, it usually does not contain complete data, making it non-reliable or of any use.

Convin analyzed the entire sales calls to understand what topics their clients were talking about and used this information to **create marketing and sales collaterals** for their sales pitch and **virtual event** (55 events in 2021, expanding it this year). And made their content more customer-focused.

4. Increase in Deal's Uptake

Now that the Carestack has a way of reviewing calls before follow-ups, they utilize this data to better engage with prospects and analyze opportunities in every sales call. It resulted in an increase of **deal uptake by 47%**.

Carestack's sales team made it a practice to listen to previous sales calls before the follow-up and to even go through the call analytics. It helped draft a better sales script for the follow-up calls and engage with customers effectively and efficiently.

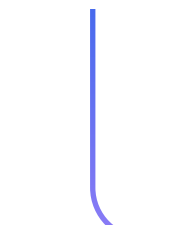
Carestack also observed with focussed follow-up the number of calls required to close the deal decreased or, in short, the **sales cycle shortening**.

5. Marketing and sales videos view time increased.

Carestack even utilized the data of Convin's customer intelligence to explore the most talked about topics and used this data to create their marketing videos, which they publish through their Vidyard account. The view time for these videos improved by **more than 60%**.

6. Reviewing and Feedback time decreased.

Like all SaaS-based companies working remotely, in this pandemic too, Carestack's team also lacks resources for auditing and reviewing sales calls. And even if some calls were audited, it would be time-consuming, which was not really useful as the deal would already be missed.



Coaching takes a fraction of the time being able to search for keywords and listen to certain areas and give feedback.

- Dan Hall, Director sales, Carestack.

Convin analyzes the sales meeting post-call and sends the call audit report directly to their sales leader and sales director's inbox so that they don't miss out on any crucial deal information.

7. Virtual Events attendees increased.

After using Convin's feature dashboard to extract the topics that the customers were interested in, Carestack launched a series of topic focussed virtual events; the number of attendees for these events increased to more than 200 compared to more generic topic events.

Watch video

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