



Case Study

Salesforce Health Cloud Implementation

Prepared By : SP Tech Inc.



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Who Are We?



SP Tech is a Salesforce success partner, helping businesses across the globe to Develop, Sustain, and Manage the digital ecosystem for years now.



We were established in 2015, currently working across the USA & India. Our major expertise and 20 years of combined knowledge can promise you robust solutions across the healthcare and financial domain.



Our experts focus on your problem areas to figure out solutions, which can leverage the best of the Salesforce Cloud Computing platform. In turn helping you get more Sales, drive better revenues, and focus on exponential business growth.

Project Description

A Bethesda, Maryland based health care provider needed Salesforce Health Cloud Implementation across their four different Business Units. This includes seven clinics across Maryland and Virginia, Online energy shots, Lab and Pharmacy.



Industry
Health Care



Products
Salesforce Health Cloud

About Our Client

Our Client is pioneer in medical field and more particularly in weight loss. They have helped thousands of people over the years to jumpstart their mind/body transformations through unique, time-tested methods. Based out of Maryland and Virginia, their clinics provide unique and customized weight loss programs. They include powerful prescription medications, fat-burning injections, long term hormone balance, and metabolism boosters.

Challenges

- The current process and solutions were difficult to scale.
- System was not made to scale as the business was scaling.
- The overall Process was not able to keep the clients happy
- The old solutions were not aligned with Salesforce.

Solutions

- SP Tech was selected as a partner due to the expertise on Health Cloud as well as ability to design scalable solutions. During our discovery phase, we found and solved four problems to meet their budget and timeline.
- **The current solution wasn't built to scale:**
- Taking the time to analyze and understand the capabilities of their solution allowed us to discover that it wasn't designed to scale. To build an application that could scale and create value, they required us to build it from scratch using Health Cloud as the base.
- **Key Features**
- Some key features required were not native to Salesforce Health Cloud and would require custom development. When situations like this occur, SP Tech works with clients to understand the tradeoffs. As their Director of Product Management puts it, "SP Tech was able to help us make smart decisions around customization efforts to maximize specificity while avoiding too much technical debt."

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➤ **The current processes weren't built for scale:**

Building for scalability is paramount for a successful application. To make them scalable, it would not only require developers to plan for handling large amounts of data, but it also requires some fundamental changes to the processes.

➤ **Key Features**

SP Tech implemented standardized processes to provide structure & templates. These templates ensured greater accuracy in data & allowed clients, practitioners, or new employees to onboard faster & left almost no room for error. Their Salesforce Program Manager explained, "SP Tech eliminated redundancies, replaced manual workflows in Excel, email, or paper-based, and created data validation that didn't exist before. It was really an engineering manager's dream come true to have an incredibly knowledgeable team come in and set us up with the latest and greatest toolset, processes and architecture."

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➤ **Keeping current clients happy:**

One of the most nerve-wracking moments for our clients is when systems are migrated over. There must be close alignment on all fronts to ensure that this transition happens smoothly. If all these pieces aren't orchestrated correctly, systems crash and cause frustration with their current customers. However, our team managed everything in an organized manner.

➤ **Aligning with Salesforce:**

Using our intimate knowledge of Health Cloud, we were able to quickly solve problems and adjust course as needed. It was important to not build a solution that would be outdated when it was released. To help assuage fears, we developed the entire solution using only Salesforce Lightning.

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➤ **Security Model**

The client asked SP Tech to design and implement a more efficient solution to manage four different business units & processes with Salesforce Health Cloud under same Salesforce Org.

- Set-up Organization wide default for Account & Contact as Private
- Configured sharing rules for different business units
- Created separate record types for each business units
- Defined Profiles and Permission sets
- Defined roles for sharing security of Org
- Configured Public Groups
- Setup configurable way for adding fulfillment centers

Results

➤ Improved Care Quality

Improved care quality and increased the number of patients they could serve by 6x now.

➤ Single System

Reconciled a multi-platform legacy system, pen, and paper patient information system to a single system on Health Cloud.

➤ Increased Customer Satisfaction by 20%

Customer satisfaction increased above benchmark levels; agent productivity multiplied more than six-fold; first-call resolution boosted 20%.

➤ Improved Productivity by 24%

Improved data quality, eliminated redundancies, and built a platform to truly scale.

THANK
YOU!

