PRAGMATIQ

COMPANY CASE STUDY

MEDNEO

medneo

COMPANY BACKGROUND

medneo is an innovative diagnostic imaging company specialising in MRI and CT Imaging. They have 25 centres across Germany, Switzerland and the UK, alongside a range of equipment that is serviced out for external usage.

In order to support them, medneo required a Bespoke CRM Solution that Pragmatiq was able to deliver.

CHALLENGES

- Previously using SugarCRM that was no longer fit-for-purpose, alongside other disconnected systems

- Lack of connection between systems causes lost hours through duplication of work, manual workarounds outside of the system

- Had no way of structuring their opportunity process in the previous system

- Difficult to navigate the data in the system, creating inefficiencies across the business

- Reporting was a manual, admin-heavy task each month

- Challenges around effectively managing various contracts and relevant documentation

- Limited visibility around the effectiveness and performance of their sales campaigns

SOLUTION

- Implemented Dynamics 365 Sales

- Re-architected the Sales system process

- Streamlined and automated key organisational processes within the system

- Provided a structured way to manage contracts and relevant documentation

- Implemented an integration with Xpertdoc and Docusign to generate and send contracts

- Customised product catalogues to suit their requirements

- Implemented marketing automation to manage campaigns, email marketing and customer journeys

- Implemented an integration with Power BI to provide enhanced reporting capabilities

- Implemented an integration with Business Central

BENEFITS

- Improved visibility and access to information

- Time saved across the business

- Streamlined contract generation process

- Enhanced reporting and insights

- Improved marketing capabilities

- Connected technology landscape

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CHALLENGES

medneo were previously working with SugarCRM that was no longer fit-for-purpose. The CRM contained data around their sales processes, customer data and contract management, however this was unstructured and complex. Every person within the previous system was defined only as a contact, and there was no way of defining what stage a person/company was at in the sales process. Working in this way was confusing and time-consuming for the users across all departments to navigate the information, leading to inefficiencies that heavily impacted productivity.

Alongside the CRM, medneo operated with a disparate application landscape, with very little connectivity between the separate systems. Data that needed to be visible across the business had to be manually added or manipulated before it could be entered into other systems. This was particularly problematic around contracts; the way these were set-up and defined in the CRM system was not aligned with how the billing for medical examinations is prepared. As a result, the billing team had to spend time accessing the details of a contract in several applications.

The lack of connection between systems also impacted reporting capabilities. It was difficult to effectively collate information from different systems and gain accurate insight into the overall figures, without a lot of manual work.

medneo also faced numerous challenges around contract management, a key operational aspect of the business. Within the previous system, there was no versioning history of a contract, meaning that medneo could not track changes or easily identify what contract a historical examination was performed under. On top of this, the contract document generation and signing process was manual and time-consuming. Documentation was generated manually, posted for signing, then sent back to headquarters where they were then scanned and uploaded to SharePoint. This process was a costly and time-consuming approach, that could be significantly improved within the new solution.

Another challenge with the previous system was the lack of a product catalogue, to manage the range of equipment that can be serviced out for external use. To manage this process within the CRM, there was a free text field on a record where a user could specify the product, however, there was no pricing control and this data could not be easily tracked, reported on, or segmented.

Finally, medneo had limited visibility around the effectiveness and performance of their sales and marketing campaigns. They run a high volume of campaigns on a yearly basis and spend a considerable amount of money executing these campaigns. The previous system did not provide the level of insight required to effectively report on how campaigns are performing throughout the sales funnel, as well as the number of leads, opportunities, offers and contracts that have been created as a result of the campaigns.
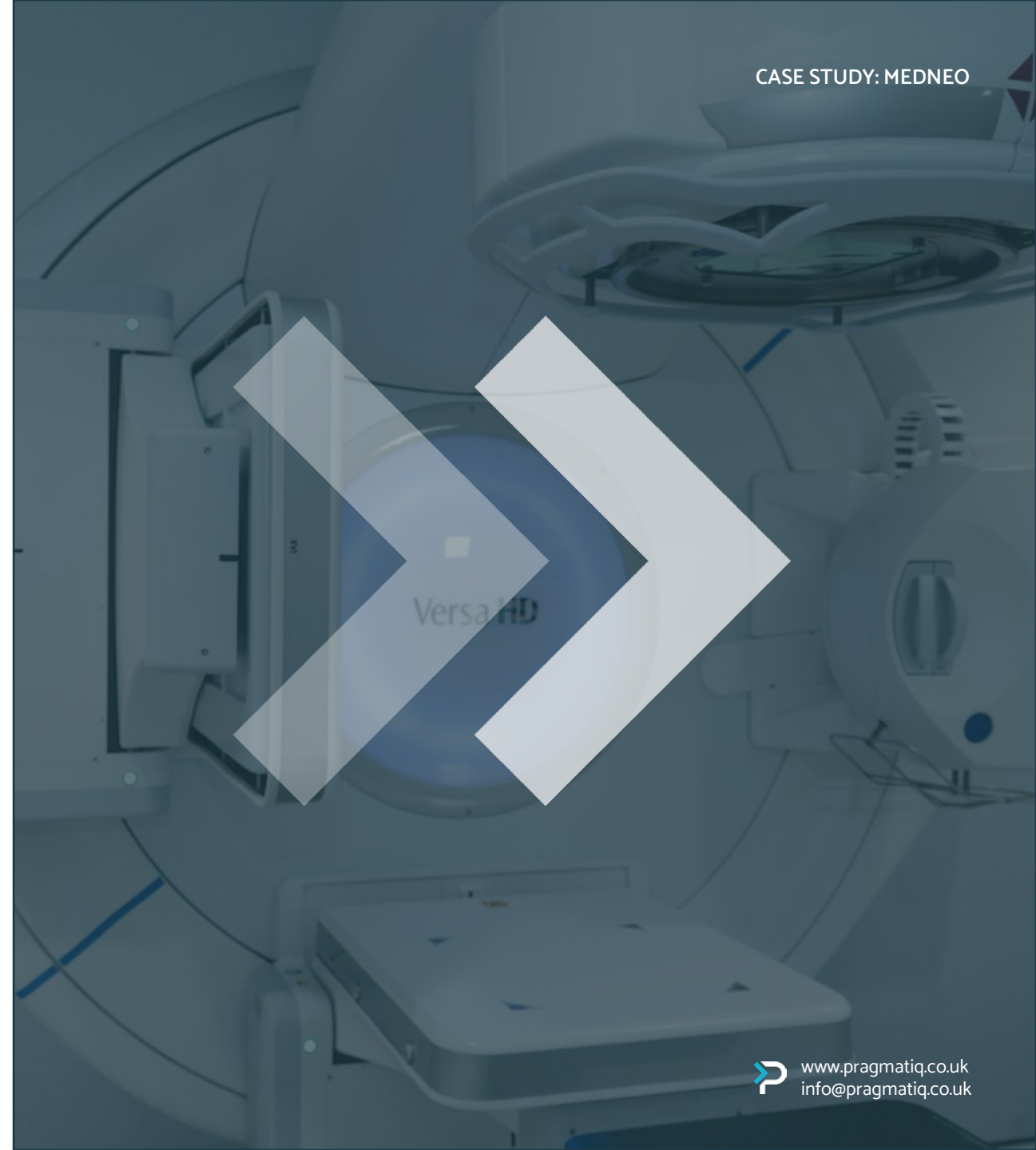
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SOLUTION

To overcome the challenges medneo faced, Pragmatiq designed and implemented a Bespoke CRM Solution, built on Microsoft Dynamics 365. Customisations were made to ensure that the system accurately reflects medneo's sales process and to make the system easier for employees to work with.

Functionality was built to accommodate accounts and contacts. This is particularly useful for capturing the details of doctors, as a significant amount of information can now be captured in an organised way, including the doctors' key specialisms. It is also common for doctors to have links to multiple surgeries, so connection functionality was also built to fit this need.

Within Dynamics 365, medneo now has different types of records available, rather than all information stored in contact records like in the previous system. This means information is organised in a better format and can be accessed quickly and easily by anyone who needs it.

To manage the contract management process, we implemented an integration between Docusign and Xpertdoc, allowing medneo to automatically generate contracts and other relevant documentation. Dynamics 365 understands the terms & conditions to be sent on the contract, can pull through the correct product and pricing, automatically sends the document for signing, and then once this is received back, will automatically save it to SharePoint.

Pragmatiq also implemented functionality to support contracts and agreements around product upsells. This means that when a user signs a main contract, the system can recognise what additional agreement should also be sent. In the occasion of a price update, all relevant contracts can be automatically found, and updated with the new pricing, without the need for someone to manually find, change, and re-send information.

For campaign management, an integration with Dynamics 365 Marketing was established. This provided a simple way for medneo to execute sales and marketing campaigns across the relevant channels. Within the system, users can easily segment information and assign contacts or leads to specific campaigns. From this, campaign material could then be automatically created, such as creating a letter, building an email or assigning a phone call activity. Medneo also required that once a campaign is closed, leads are removed to ensure they are only in one campaign at a time. Functionality was built to support this process, and allow management to see a complete history of the activity/campaigns that people have been involved in.

SOLUTION CONT.

Power BI was also implemented during the project, transforming the previous manual and time-consuming reporting process. medneo can now easily analyse areas such as; understanding how successful marketing campaigns were, how many opportunities are attributed to marketing activities, detail around sales opportunities, contracts upcoming for renewal, etc. Management can then use these insights to gain a more advanced view of the organisations and make more informed decisions.

Lastly, we established integrations with IQIVIA (a medical database) and Microsoft Dynamics 365 Business Central. This enhances the flow of information between systems and saves users time switching between multiple systems.
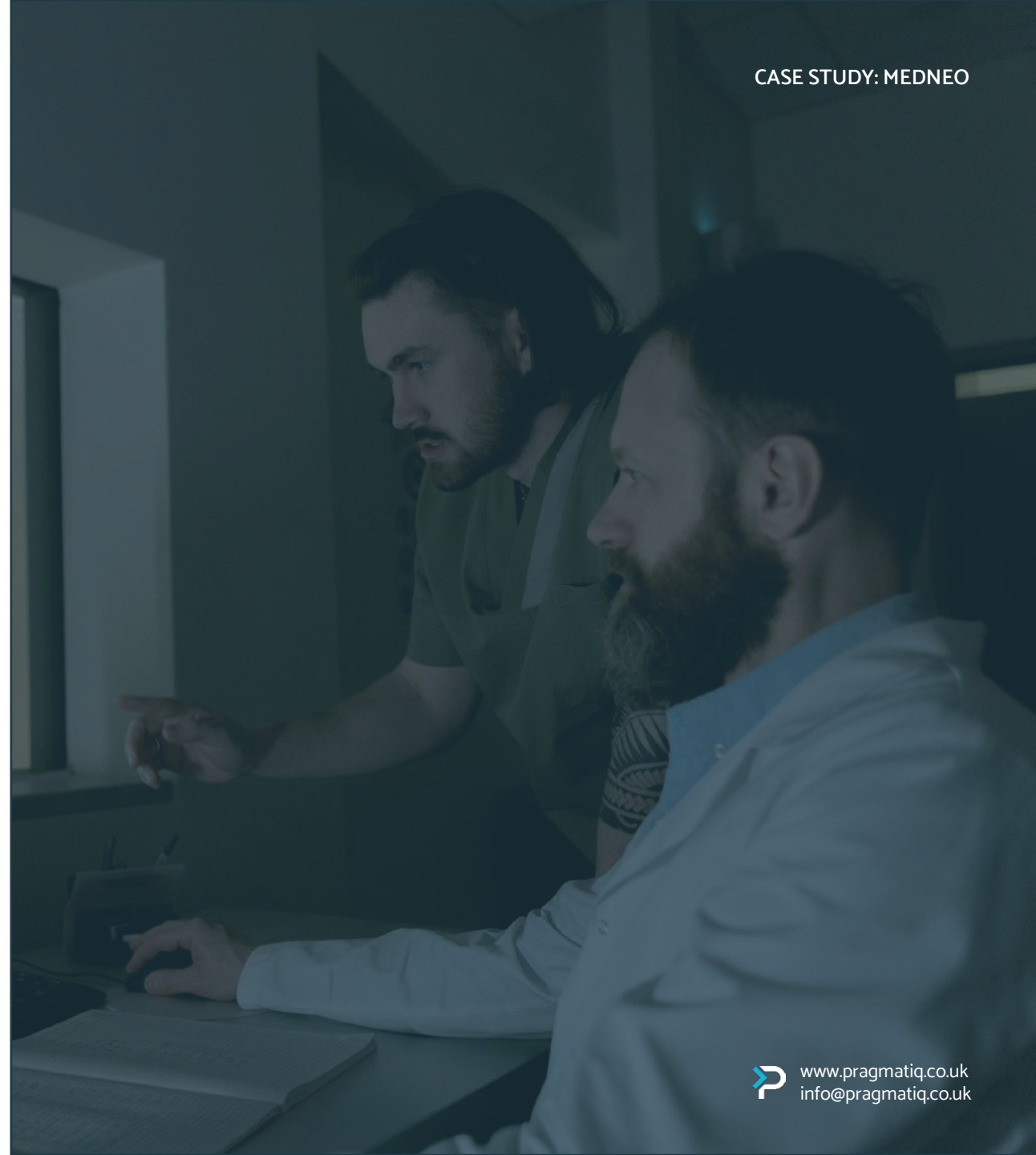
BENEFITS

Through the implementation of our solution, the following benefits were realised:

> **Improved visibility and access to information –** As a result of centralising information in one place, users reduce time searching for information and can conduct their daily tasks more efficiently. Additionally, by accurately reflecting medneo's processes within the system and creating different record types, the information is displayed in a more digestible and accessible way.

> **Streamlined contract generation process –** By streamlining the contract generation process, medneo have better visibility around contracts, can improve the final stages of the sales process, and reduce the time spent manually generating, distributing and managing contracts.

> **Enhanced reporting and insights –** Management can now gather key insights quickly and easily using Dynamics 365 and Power BI reporting capabilities, allowing them to make more informed decisions. This information can also be used to guide their external call centre teams on which sales/marketing campaigns to prioritise.

> **Improved marketing capabilities –** medneo now has capabilities to execute sales and marketing campaigns across letters, emails and phone calls, directly from Dynamics 365. As the data is also stored in one centralised system, users save time segmenting and assigning the data required for these campaigns. In addition to this, management has improved visibility of key stats around the campaigns, such as campaign performance and conversion rates.

> **Connected technology landscape –** medneo previously had a disparate technology landscape, operating from several disconnected systems with limited flow of information between these. Implementing Dynamics 365 ensures all data is stored within a centralised solution, and integrations with other key systems such as IQIVIA and Dynamics 365 Business Central, ensure there is a connected flow of information across the organisation.

"We engaged with Pragmatiq to implement Microsoft Dynamics 365 CRM to support our marketing, sales and contract management processes. Our existing CRM system was highly inefficient and lacked the integration and reporting capabilities we needed to help our business grow.

The Pragmatiq team gained a thorough insight into our complex business needs and were able to deliver a system providing the structure, automation, and insight to enable our business to work efficiently, while acting as a strong foundation for future development and integration into our other business applications.

They demonstrated expert product knowledge and provided innovative solutions throughout the project and continue to provide high-quality guidance and support over post go-live managed service.

We enjoy working with the Pragmatiq team, not only on a professional, but also on a personal level and have built up a great easy relationship with the whole team since we've started working together."

PATRIK KARWAT - HEAD OF GROWTH PROJECTS AT MEDNEO GMBH

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Pragmatiq are a Microsoft Partner, specialising in building bespoke technology solutions that solve real problems and make a difference.

If you want to learn more, please get in touch...

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