

# Global Healthcare Data Insights and Consulting Company Salesforce Implementation

## ORGANIZATION

Our client is a division of one of the largest healthcare technology companies in the world. The company provides data, analytics, and research to the life sciences industry. As real-world evidence and commercialization partners, the customer enables clients to bring safe and effective treatment to patients worldwide. The team has expertise across various therapy areas, including unique thought leadership in oncology and rare diseases. Our client aims to accelerate the discovery, development, and delivery of extraordinary insights and therapies to improve everyday health for all people globally. By combining decades of healthcare innovation, life sciences knowledge, and collaborative research, the client provides data-driven solutions and expertise that helps bring remarkable clarity to life sciences and healthcare's most important decisions.

## CHALLENGE

The client had just moved to Salesforce from another legacy CRM system. The partner involved with the migration was unfamiliar with their legacy CRM system and the client's actual business processes. Unfortunately, this resulted in a sub-par implementation experience for the client. They found several business processes were not addressed in Salesforce properly or were just overlooked entirely. Some of these were handled for years in their legacy CRM without issue. Even though Salesforce is a well-established CRM product, it made them question their move to Salesforce, considering the dollars spent and sub-par results.

## TECHNICAL SOLUTION

The client reached out to XTIVIA for assistance. With over **20 years in the CRM business and experience with several CRM products**, including the legacy system in question, XTIVIA spoke with stakeholders about key pain points with the new Salesforce system and which requirements had not been addressed by previous partners.

XTIVIA set up weekly meetings with the client to understand the processes and issues that were lacking. After initial discussions, it became apparent there were actually no major technical issues to overcome. Salesforce's robust configuration capabilities with **no-code solutions and quick deployment capabilities** could easily handle most of these requirements. XTIVIA team's prior expertise with the legacy CRM and Salesforce addressed many of the initial data-related issues with **data re-alignments and cleanups**. Having handled many of these system migrations in the past allowed XTIVIA to pre-empt issues that commonly occur with data migration from these two systems.

To quote one of the stakeholders, *“XTIVIA’s key benefit is that they really listened! They spoke our language and understood the issues. They didn’t use technical jargon that was meaningless to us, instead they let us explain the issues and they architected and proposed quick bite-sized solutions that were easy to understand, quick to implement and verify. It was such a breath of fresh air to have a partner that understood our needs and got us where we needed to be so quickly! We wish we had known of XTIVIA’s capabilities sooner!”*

With initial implementation issues addressed, XTIVIA also further extended Salesforce for the client by implementing a complicated commission calculation process that was done relatively manually in the past. The commission calculation process had to accommodate country-specific requirements, historical sales volume and numbers, sales products, multiple salespersons, and commission splits to arrive at the actual calculation. The entire process was handled without writing a single line of code in Salesforce and handled entirely with the point and click codeless interface, demonstrating the true power of the Salesforce platform. This inspired confidence in the customer that they had made the right decision to move to Salesforce and had the right partner in XTIVIA moving forward.

## BUSINESS RESULT

Two years since the client first moved to Salesforce, and after an unfortunate start with the product, with XTIVIA as their partner in success, they are now actively using the platform to handle their Sales, Partner and Vendor tracking, Marketing Campaigns as well as Commissions. It is being used in 7 countries around the world and continues to be a growing platform for the company and its new initiatives.

### KEYWORDS

Salesforce, Sales Cloud, Salesforce Consultant, Salesforce Partner, Salesforce support, Salesforce development, Salesforce Configuration, Admin On-Demand, Salesforce Marketing

### SOFTWARE/PLATFORM

Salesforce

## ABOUT XTIVIA

XTIVIA is a proven technology integration and innovation company known for delivering leading-edge technology solutions to our clients’ specific requirements, regardless of project complexity. We bring next-level business operations to reality through Application Development, Business Intelligence, Data Warehousing, Database Support & Management, Enterprise Information Management, Digital Experience Solutions, and Enterprise Resource Planning. Our success stems from a demonstrated ability to deliver deep expertise via professional services, empowering clients to leverage their chosen technology successfully, competitively, and profitably. XTIVIA has offices in Colorado, New York, New Jersey, Missouri, Texas, Virginia, and India. [www.xtivia.com](http://www.xtivia.com)