

## Leading Healthcare Staffing Provider

Streamlining Sales and Marketing Operations through CRM Training Expertise

### Business Challenge

A leading Healthcare Staffing Provider recently doubled in size, acquiring a key competitor utilizing a multi-brand marketing approach. A strategic internal decision was made to first migrate one of the largest brands from a legacy system to Salesforce.com. Acumen Solutions was engaged to offer our expertise in design and configuration recommendations to the current Salesforce application in order to incorporate new business rules as well as to deliver end user training to the Recruiters and monitor adoption. The goal was to implement this CRM solution across the newly acquired brand with a focus on standardization and optimization of daily business processes. The challenge was to prove success in terms of practicality, pipeline visibility and adoption.

The major project challenges included:

- Working remotely on design calls and process changes
- Overall change management resulting from recent acquisition and
  - logistical move
- Need to effectively replace a legacy system and manual processes
- to decrease time spent on tasks and increase efficiencies
- Meeting an aggressive training delivery deadline to coincide with data
- migration
- Need to implement a CRM solution across business units with changing processes
- Provide metrics and a complete view of tasks

**100% user adoption  
was obtained**

**Operational reports  
provided the  
organization with true  
visibility into the  
combined sales  
pipeline.**

### The Solution

Acumen Solutions worked daily with the client's internal IT and business teams to fully understand business requirements and deliver a Master Training Plan, incorporating minimal changes to the existing CRM application. Remote calls as well as several visits to the client site were key components to ensure successful delivery. "Day in the Life interviews" were conducted with Recruiters and Quality Assurance staff in order to understand current business processes and develop relevant training scenarios and curriculum. Executive sponsors effectively communicated the message of the upcoming training and rollout. Post-training delivery, Acumen Solutions provided onsite floor support to monitor usage and adoption.

### **Technical/Business Expertise**

Acumen Solutions leveraged its resources across the CRM Practice in order to provide the right skills to complete this project. CRM Expertise was utilized in optimization and configuration of Salesforce.com. This included working with the client to understand their business requirements and translating them into the software. Only through thorough knowledge of Salesforce.com, were the Acumen consultants able to ask the most pertinent questions of the business owners.

Training delivery expertise was utilized to develop and deliver successful instructor-led training courses. Acumen prides itself on administering professional and well-disciplined training sessions. By using best practices such as class size, delivery, and hands-on vs. lecture style classes, Acumen was able to deliver the most effective training sessions.

### **Return on Investment**

As a result of this project, 100% user adoption was obtained and operational reports offered true visibility into the pipeline. By correctly implementing a CRM tool, the sales team was able to optimize the use of their investment. The sales team was able to track their leads in a more formalized environment, as well as having their newly acquired company working on the same system as the legacy company. By combining distribution lists, multiple brands could now use the same list for multiple campaigns. Having the lists in a single system and being able to easily navigate and use the system due to training, the client received full value from their IT investment.