

## SITUATION OVERVIEW

Hernried Center's legacy business system consisted of a disconnected and underutilized CRM system with no online presence or automation processes. Hernried needed automation for onboarding and intake of new patients. Call notes, email history were all separate costing time and money and frustrating new clients.

## + ABOUT

The Hernried Center is a medical weight loss obesity treatment center with a proven program marketed as Keep It Off.

## THE CHALLENGES

With clients reaching out to them from many different channels, the Hernried Center struggled prioritizing and responding to new potential patients. The Hernried Center desire to engage and remain in contact with a perspective patient from first touch through packet completion was very difficult and disconnected.

Retail activity online or over the phone were siloed, making comprehensive sales reports difficult and disconnected with no automation.

Inability to track sales leads or recover dead leads.

Phone interactions were siloed and on independent systems without a central repository restricting ability to share between team members.

## Solutions & Results:

- **Anytime, Anywhere Access to Real-Time Sales Data:** We created a new Dashboard & Reporting system that contains real-time revenue data and is accessible on-demand anywhere in the world. This actionable real-time sales data allows them to quickly pivot their marketing message if needed, it provides insight into customer buying patterns, and reveals possible patient alternatives to existing therapy. The personal dashboards for the staff tracks everything at the individual level.
- **360° View of Patient Communications:** We worked on change management with the staff to track all calls and emails inside Salesforce. This led to improved coverage, faster response time and personalized experience for customer accounts and potential patients.

## Solutions & Results:

- **Integrated CRM:** Our configuration of Salesforce provided The Hernried Center greater visibility of client interactions. This enabled staff with the ability to create automated tasks and reminders, expedite patient onboarding, rank patient status for intake and onboarding in real time. Real time integration from website to CRM allowed for new patient tracking and automated follow up. This helped with outreach and overall patient engagement.
- **Automated, Targeted Marketing:** Hernried Center can now automatically deliver marketing campaigns with customized messages and offers based on that customer's interest from one system. Using the same platform to record call activity, patient touch will allow the team to be in sync.
- **Multi-Channel Customer Engagement:** The Hernried Center's Salesforce solution provided a full existing patient centric system. This allowed the staff to record interactions and onboarding from phone, email, walk in or online, keeping staff aligned.

## Overall Results:

Konnectryx improved the efficiency of The Hernried Center entire organization by installing a comprehensive, cloud-based solution. The Hernried Center employees are now more efficient with anywhere, secure, real time access to patient history and customer information to connect with more patients and drive incremental revenue. Integrated systems saved Hernried Center operational expenses from lost time and helped grow revenue with more efficient throughput. And additional benefit was employees felt more empowered to help customers and less frustrated with multiple systems not working together.