

## 12 Ways Medical Device Companies Can Maximize Return on Their CRM Investment

Customer relationship management (CRM) has evolved from a system that was originally designed for medical device company sales teams into a company-wide platform that gives a comprehensive, 360-degree view of customers, providers, and patients.

Because of this evolution, any medical device company that's considering an investment in CRM should examine all of the areas of the business in which a CRM system could provide value—today and in the future.

Not all CRM vendors offer the same set of functionality. Your answers to some of the following questions may lead you in the direction of a specific CRM vendor or vendors.

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### Lead Management

Will you want to send inquiries from your website and other sources into your CRM system? Are you already committed to a website form builder? If so, can your existing technology be integrated into a CRM system? If yes, what will be your rules for how leads are assigned? You may also want to send partner lead registrations into your CRM.

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### Sales Quoting

Should quote creation be an integral part of your CRM system—or should it be external to the CRM system? If your quoting process is simple, it may be easy to implement in CRM. A complex quoting process may require implementing a CPQ (configure/price/quote) add-in for CRM. Alternatively, quotes may need to be produced outside of CRM.

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### ERP Integration

Integrating your ERP with your CRM will keep your customer accounts in sync across systems. Your salespeople will also have visibility to invoices and orders. Will the value derived from integrating with your CRM system exceed the integration costs? The cost of CRM-to-ERP integration depends on a number of factors, including the brand of ERP system that you are using. This area requires an analysis of both business requirements and technologies.

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### Field Service

Does your company have a team of field service technicians? Many medical device companies have ditched the spreadsheets and whiteboards in favor of using a CRM platform to dispatch field service technicians—and to relate that activity to customer support tickets.

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### Customer Service

Do you have a customer service team that fields emails and phone calls from customers? If so, should customer support functionality be on the same platform as your sales automation? If it's important for salespeople to be aware of any support issues that their accounts may be experiencing, then sales automation & customer service management should be on the same platform.

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### Corrective Action and Preventive Action (CAPA)

The same functionality that powers customer service & support within a CRM system can be used for managing CAPA-related complaints, service issues, and repairs. If you do not have a CAPA procedure management system in place, this is another area in which CRM can play a role.

### Digital Marketing

Should your current digital marketing activities be incorporated into a CRM platform? If your marketing team has already made a commitment to a specific platform, would it be practical to integrate the current platform with a new CRM system? Or, should your marketing team adopt the CRM vendor's marketing automation capabilities?

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### Customer & Patient Feedback

Are you currently sending surveys to customers, providers, and/or patients? If survey results are isolated in their own silo, they're not giving you what you need. Survey information can be incorporated into your CRM system.

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### Customer & Patient-Facing Functionality

Do you need to offer a customer, provider, or patient-facing portal? If so, would there be benefits to this portal being an integral part of your CRM system? Recognizing the need to further address the customer experience, several CRM vendors now provide customer, provider, and patient-facing functionality via a secure login.

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### Case Tracking

Do you have a scalable system in place for tracking surgical cases? Rather than tracking all the details of a case in a document, all of the data points from a surgical case (physician, rep, patient, procedure, etc.) can be tracked within CRM in an organized way. Structuring this information creates greater consistency of collected data and better reporting.

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### Reporting and Analytics

What types of reporting do you need across sales, marketing, customer service, and other functional areas? Should the CRM system's analytics solution be able to consume data from non-CRM sources such as a data warehouse?

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### Other Areas

There may be a number of other requirements that are specific to your business model. Some of these could be addressed through CRM configuration and customization. Others may need a third-party add-on. Whatever those needs are, it's important to identify them early on and to articulate the requirements to prospective CRM vendors.

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### About J2

J2 Interactive is an award-winning software development and IT consulting firm specializing in customized solutions for manufacturers, hospitals, labs, research institutions, and health information exchanges. To discuss the best customer support options for your medical device company, drop us a line.

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