

CLIENT SUCCESS STORY

Salutem Healthcare

Project
**Salesforce Best Practice and
Business Process Assessment
and Platform Delivery**



Client
Salutem Healthcare



Industry
**Health Life Sciences
– Residential Healthcare**

Location
Nationwide

Staff
3000+

Products
Salesforce Sales Cloud

Salutem Healthcare, a UK-based residential healthcare operator and investor providing residential healthcare and education services for more than 1,350 adults and children, approached us with a desire to implement a platform that would drive productivity and support the activities of more than 3,000 members of staff.

The Business Challenge

The client wanted to bring a solution to a business-aligned position, embedding the system within the various existing operational processes and activities within the organisation. We discovered that early design choices when implementing Salesforce had led to poor data structure - which allowed data quality issues to manifest and, crucially, prevented the maintenance of historical data.

**“Incredibly knowledgeable and personable
- able to very quickly work out the business
both from a product supplied perspective
and analysis of the personalities at play.”**
- Salutem BD Support Manager

The Solution

Consleague's Solution Director worked closely with the Saluitem team to perform an investigative analysis of the current and desired future states. We obtained a log of observations relating to areas of feedback received from the Saluitem team, whereby systemic or process-related improvements would yield significant benefit to the Organisation.

Through this process, each observation enabled Consleague to identify a recommendation that resulted in positive process or technological changes.

Our recommendations delivered significant improvements that would not only address the current concerns of the organisation, but also deliver enhancements that would add considerable value to the overall technology platform.

Beginning with an issue that was of great concern to the Saluitem management team, we set out to implement a refreshed data model that accurately modelled each of the business services, in turn, successfully providing the client with rich and robust management Information.

The Results

As a result of Consleague's recommendations, Saluitem proceeded with the delivery of the platform resulting in:

- Reports and dashboards created to drive calls to action and summary reporting
- Object types introduced to facilitate data capture and workflows and non-relevant fields removed
- Page layouts to provide a more engaging and productive user experience
- Introduction of the concept of a customer-centric view that facilitates the movement of customers between services
- Utilise workflows and automation to centrally upload new fees (for current or future years)
- Introduce automation that ensures that data quality is applied at the right point in the overall processes
- Utilise mandatory fields and info panels to draw attention to data entry errors
- Calculation of fees (logic and associated architecture) in Salesforce to provide end to end fee management within SF
- Salesforce contract management to store contracts against accounts and contacts
- Synchronisation Salesforce & Sage - Sage receives information in relation to billing & Salesforce receives payment info
- Salesforce opportunity teams for multiple people to be involved in processes at different stages and with differing authorities

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