

Reimagining Medtech Operations:

Committing to a New Way of Thinking
Can Unlock Opportunities for Greater
Success and Efficiency



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Major changes over the past 18 months have meant medtech companies had to quickly pivot and change the way they do business. Without the option to interact in person with healthcare providers, relationships went virtual without skipping a beat.

As the appetite for medtech solutions grows, that ability to work nimbly and creatively is paying off. But even if the processes developed in crisis mode have worked well so far, there's a tremendous opportunity for medtech companies to harness technology to transform their businesses, boost efficiency and create greater future success.

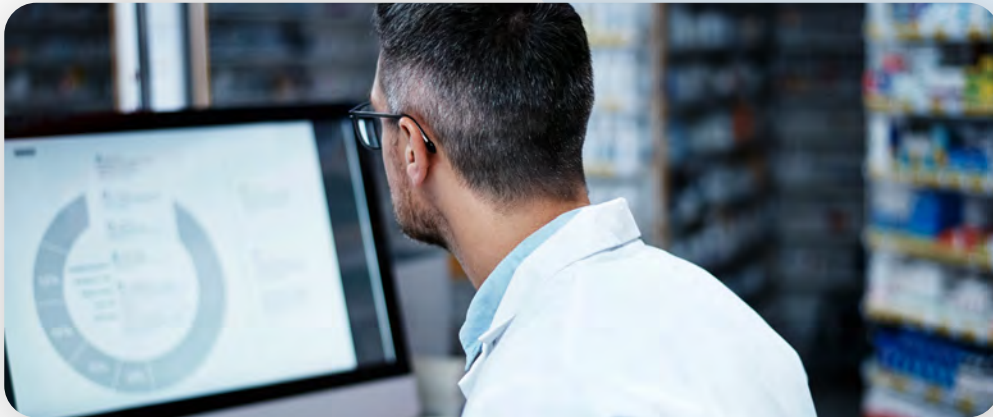
As pandemic restrictions ease, most hospitals don't plan to allow sales reps into their hallways at the same rate as they previously did. And current approaches to selling without face-to-face interaction make it difficult to build new customer relationships or stay top-of-mind with current customers.





Fortunately, there is a better way for medtech companies to operate in a post-pandemic healthcare world. By extending the value of the pandemic-era processes that are working for you now, you can build a solution that will carry your team into a successful future, far beyond the current environment. That means creating personalized customer journeys and connecting with audiences in new ways. It means reimagining your business models to optimize for greater efficiency and productivity.

It's not necessary to make a full transformation of tech infrastructure; instead, the most innovative models can be added on to your existing solutions to help you master virtual selling and digital interactions with customers, delivering commercial excellence without a total technology overhaul. **This playbook will explore the key components to look for in building a complete digital customer relationship management experience.**



From one screen, medtech professionals have visibility into coverage schedules, field inventory, clinical support, price lists, sales agreements and forecasting.

Get a complete view of your customer

Many of the physicians who were once skeptical of virtual interactions with sales reps now report that these exchanges are high quality, according to Bain research.

But if medtech professionals aren't in front of their customers as frequently, they must find enduring ways to stay top of mind and provide value to healthcare providers and hospital systems without always being in person.

One way to do this is to unlock the full value of the CRM. Platform-based CRMs do much more than store customer data; they use artificial intelligence (AI) to power deep and meaningful engagement, and big data to deliver actionable insights.

Because a smart system keeps track of all interactions with each customer, the system can always tell you what will be the next best step to take in any customer relationship, says J. Cris Salinas, M.D., senior director of global healthcare and life sciences at Salesforce.

For example, before meeting with or interacting with a customer, a medtech sales rep can simply check his or her intelligent CRM and find out information like:

- What you discussed with this customer the last time you interacted
- Whether the customer's contract is coming up for renewal
- The customer's procedures have increased in a certain area
- The customer is falling behind on ordering enough to receive a volume discount
- You need to invite the customer to an upcoming event

With real-time, updated information for every customer, the CRM can take the guesswork out of planning a sales rep's day or week by helping to answer questions like 'where do I go? Who do I see? What do I say?' "Say I'm a sales rep starting my day and wondering which doctor I should see today," says Kevin Chien, Sector Leader / GM, Medtech, at Salesforce. "My dashboard command center will give me those insights and tell me which doctor is close by, what he needs, what equipment he's using and whether it's outdated."



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But the most powerful CRM isn't just for sales reps; it provides a holistic view of the customer across marketing, sales and service. For example, when the pandemic hit, many medtech organizations struggled to keep track of customers' needs, orders and follow-ups, with their entire staff suddenly working in far-flung locations.

At Signature Biologics, however, the process was seamless because all customer interactions with all departments were already stitched together in one robust CRM. "One of the ways we were best prepared for the pandemic was that we've always had sales, sales operations, customer service and service as part of the same platform," says Dan Wagner, VP sales and marketing, Signature Biologics. "Any way customers interacted with us was captured on the same platform, and the record was kept and transparent for the entire organization. That omni-channel recordkeeping has been very important so that the people who need to take action can."

As a result, Signature Biologics' customers have commented that the company has been extremely attentive throughout the pandemic, Wagner says, resulting in a 96 percent Net Promoter Score.

Drive engagement with personalized customer journeys

Of the 75 percent of physicians who preferred in-person visits from medtech representatives prior to COVID-19, 47 percent now prefer virtual exchanges or less frequent visits, Bain research shows.

Those statistics ring true for medtech companies like Enovate Medical. “People have become more trusting and accepting of digital engagements,” says Joey Len, manager of CRM and account management at Enovate. “CIOs, CNOs, and executives are more appreciative of digital engagement because their time is so valuable.”

Because buyers increasingly want virtual relationships, medtech salespeople must be able to build and strengthen their relationships from a distance.

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Medtech companies need to build an end-to-end digital customer experience by providing more engaging, tailored content to attract and retain the interest of prospective buyers from afar, while separating from the pack of competitors that are also now relying on digital engagement to win business. Sales reps need to maximize impact with fewer touch points. They must give buyers distance and space, finding a way to keep them more engaged with less one-to-one interaction.

One way to do that is by delivering relevant messaging and interactions with AI-driven insights. For example, during the pandemic, when elective surgeries were cancelled or limited in hospitals across the country, “a lot of healthcare practitioners were idle and looking for ways to productively fill their time,” says Signature Biologics’ Wagner. “We were able to provide more education digitally that was focused on their specific needs and how to use our products to meet those needs.”

With a customizable medical education portal, medtech companies can deliver targeted content and education that customers can access on their own time and to meet their unique needs.

For example, a surgeon going into a procedure may need a quick refresher on how to do a surgical technique using a new piece of technology, Salinas explains. With a customer portal, the surgeon can login and quickly view a video refresher just before going into surgery.

A nurse or scrub tech could also log in to the portal and look up information or a video to see how to prepare the technology tool for the surgeon's use. "The education is highly personalized to the individual and their role in using the technology," Salinas says. "And because customers can access it online using their smartphones whenever they need it, sales reps don't have to cram everything they need to know into a 10-minute meeting."

Each time a customer engages with a piece of educational content, the software learns more about his or her interests and needs. As a result, the customer's next educational experience is even more personalized. With the help of AI, medtech companies can build personalized, content-rich journeys for their customers, Chien explains.





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Reimagine processes and increase organizational efficiency through automation

The way work gets done has changed drastically since March 2020, and many of the changes are here to stay. As people have grown accustomed to working remotely and through digital communications, it’s an ideal time to reimagine your work processes and embrace automation to increase efficiency.

High-performing sales organizations automate repetitive tasks so their reps can focus on strategic selling. “Sales reps sell,” Salinas says. “They are good at building relationships, finding opportunities, and capitalizing on those opportunities. But they’re often bogged down with administrative tasks that can hinder their ability to sell.”

Automated technology can remove the barriers of administrative tasks, making it easy for sales reps to update orders, record serial numbers, and manage other tasks. The automated system can also remind representatives of information they need along the way, such as how to find lot numbers, serial numbers and available supplies.

Automating administrative middle-office work like quoting and ordering helps sales reps focus on keeping customers engaged. And professionals in every department can access data from any device, app, or data source.

At Signature Biologics, automation and easy accessibility has been transformative for the sales team. “Our sales team is largely decentralized and mobility is very important,” Wagner says. “Because everything is available on our smartphones, and the system sends reminders about tasks that need to be done, our sales reps have gained the ability to manage personal obligations while managing our work obligations. The past year and a half has been a stressful time. It’s nice that we can go walk the dog and manage our lives without being tied to the home office all the time.”

Automating tasks can also make it easy for customers to do business with your company. Whether the customer picks up the phone or

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interacts with a chatbot, they are always getting the same answers and the same service. “Eliminate the hurdles so it’s easy for customers,” Salinas says. “They’re always interacting with one organization. Simplify the process for them and they’ll continue engaging with you.”

Looking ahead, Signature Biologics is aiming to move toward more self-service “in a very customer centric way,” Wagner says. Through a guided, self-service education process, Signature Biologics is working to make it easier for partners to place orders through their own portal, check on order status and contact the appropriate representatives with questions.

While many employees are more open to change now than they were two years ago, “it does take a mindset change,” says Enovate’s Len. He recommends working to develop trust within your organization and continually evaluating what you’re doing to make sure it makes business sense.

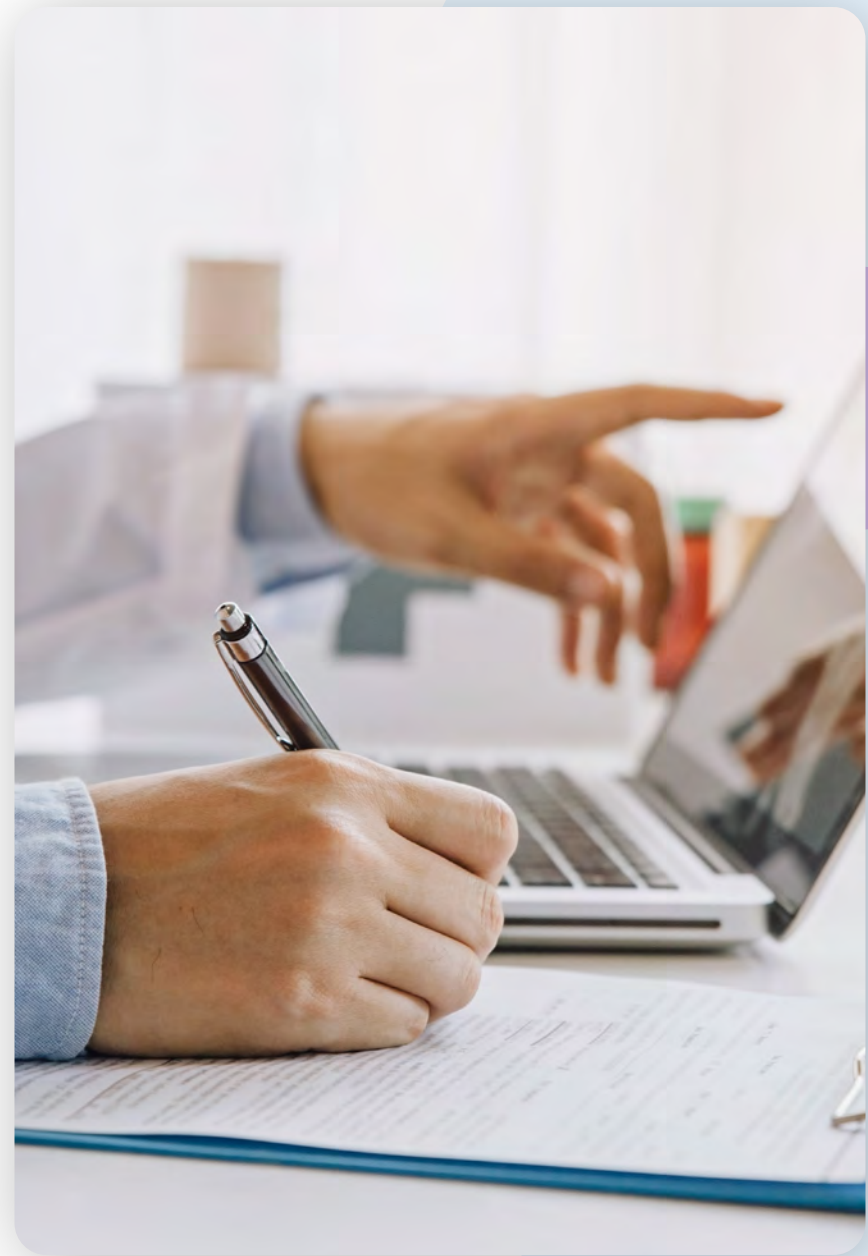
“People want to know, ‘what’s in it for me?’” Salinas says. “Make sure you address how it will help the rep; for instance, they can collect info in the moment by snapping a photo with their phone and it will all be automatically uploaded, rather than writing down serial numbers and remembering to input them later. Users can go back and focus on core tasks, such as selling or marketing, rather than spending so much time on administrative tasks.”

Use intelligent insights to close more business

The more you know about your customer, the more you are likely to sell to them. While a human sales rep is irreplaceable for building a human relationship with the customer, he or she can't be expected to remember and understand all the specific needs and interests of each customer. But an intelligent sales platform can keep up with all those details—and by keeping the sales rep informed with insights, can help them close more business.

For example, imagine your company sells several devices that work well together. When you're preparing to visit with a particular customer, it would be helpful to know that this doctor has been using a lot of product A but very little product B. When your phone pings you with that insight, you can remember to share with the doctor that many of her counterparts are getting great outcomes by using both product A and B together.

“Such insights around upselling and cross-selling can help you close more business,” Chien says.





Without insights, sales reps lose the opportunity to upsell or cross-sell. They are unable to see what products are available nearby, how many of each product, and help plan for upcoming demand.

With intelligent insights, on the other hand, medtech companies can gain visibility to optimize results in real time, as well as predictive analytics to optimize results proactively for the future. Those intelligent insights can help companies reinvent clinical selling to address changes in the market, improve operations, and provide compelling value propositions based on data.

“Data is more valuable than gold or oil,” Salinas says. “It helps you take a look at your business today and it helps you shape your business into the future.”

5 Ways Intelligent Insights Can Boost Your Business:

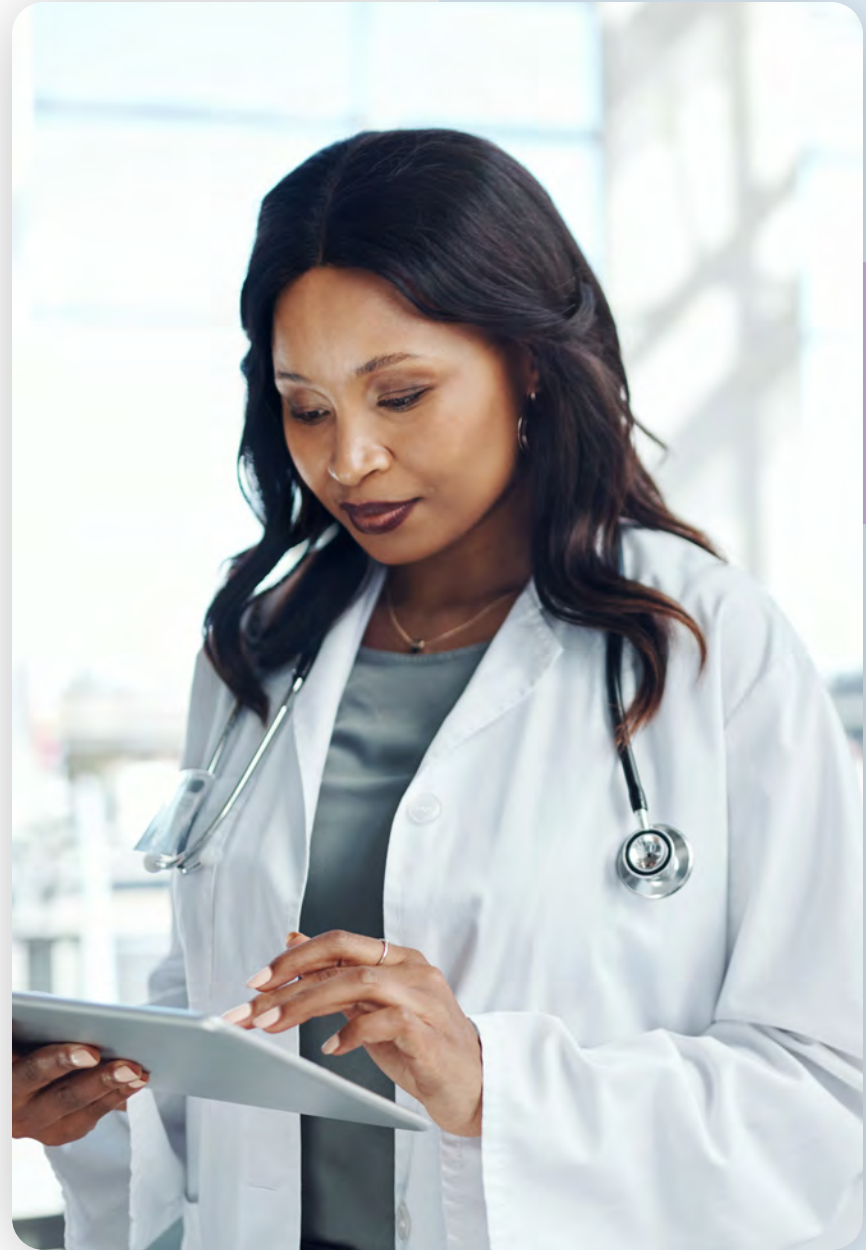
1. An alert that stock needs to be moved to different locations
2. Drive efficiencies in the contract management process
3. Simplify the ordering and reordering process for customers
4. Provide real-time recommendations to drive cross-sell and upsell opportunities
5. Leverage sales, financial and operational dashboards to understand pipeline and revenue performance, account and territory activity and pricing contracts

Conclusion

As medtech companies move toward a post-pandemic environment with new customer expectations for increased digital engagement, now is the time to extend the value of current digital solutions. Salesforce is uniquely positioned to help. Our tools extend the value of existing systems and deliver intelligent insights and recommendations that help sales teams make smarter decisions faster. With Salesforce, medtech companies gain a platform that lets them plan for the future, instead of building from the ground up.

Learn how a purpose-built platform for the medtech industry can be your system of engagement to drive commercial excellence by connecting teams, surfacing commercial planning insights, and deepening patient connections.

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