



Case Study | Intuit Health

Industry: Healthcare

Location: Menlo Park, CA

Project: Salesforce Optimization

Company Overview

Intuit Health was formed by Intuit's acquisition of Medfusion in May 2010. They are now the industry leader in advancing provider and patient communication through online services. More than 2.5 million patients and 32,000 providers use the patient portal to simplify everyday tasks such as making appointments, getting lab results, and paying medical bills.

The Problem

Intuit Health was facing **low user adoption** of Salesforce and **inadequate reporting capability** in both sales and marketing. As a result, they were **lacking key insights** on lead conversion as well as ROI for specific campaigns and the cost of acquisition per client. Without proper reporting, sales managers were **spending too much time manually gathering data** to measure sales KPIs.

How We Helped

After in-depth discussions with senior sales and marketing executives and the Salesforce administrator, we initiated multiple projects to optimize Salesforce to their specific needs.

Highlights include:

- **Identified and deleted over 100,000 duplicate records** that immediately **simplified the user interface**. We also implemented checks to prevent future duplication.
- **Made role hierarchy changes** to limit visibility of records and thereby **create more trust** in the system.
- Created **standardized sales dashboards** so that management and end users can **easily track weekly and monthly stats** and compare status to quota.
- **Closed all stale opportunities** and implemented checks to prevent future opportunities from going stale.
- **Verified correct lead source and campaign association of web leads** so that campaign effectiveness can be easily monitored.

"StarrData is easy to work with, responsive, and they keep their promises. The changes they've made to Salesforce have given us better insight into our sales processes and sales forecast. They've also increased user adoption by making Salesforce easier and more relevant for our users."

- Jeffrey Mayone, Sales Manager



Results

After just three months Intuit Health happily reports:

- **Increased user adoption** from simplification of the user interface.
- **Increased user satisfaction** from improved security and implementation of best practices.
- New ability to to **compare performance and measure ROI of campaigns**.
- **Better visibility** into sales pipeline, KPIs, and lead conversion. They have moved from being in a “black-out blizzard to clear skies.”
- New insights that support **more effective business practices and campaigns**.

Want to see these kinds of results for yourself? Give us a call today at (888) 391-4493. We're here to make Salesforce work for you.