

# Infor CRM and Xbar Integrations Open New World of Communication for ReCept

## Company Profile

### Table of Contents

Company Profile.....	1
Business Situation.....	1
Technical Situation.....	2
Solution.....	3
Benefits.....	4
About Technology Advisors.....	4

Fort Worth, TX, based ReCept is a fast growing specialty retail pharmacy with a primary focus on comprehensive care with disease specific education and counseling to support people living with long term-term diseases, including cancer, chronic pain, hepatitis, HIV/AIDS, osteoporosis, MS, Cardio and rheumatoid arthritis. Its Pharmacy Management programs assist with physician owned office-based pharmacies to focus on patient convenience with specialized care. ReCept also offers Plaza Supply, one of the nation's leading emergency medical product distributors serving first responders, fire, rescue, police, hospitals, physicians, and more.

### Company Stats:

- Industry: Pharmacy
- Number of Employees: 200+
- Headquarters: Fort Worth, TX; multiple locations nationwide

## Business Situation

ReCept started looking for a new Customer Relationship Management (CRM) solution when management realized their current system was holding everyone back. The old system was not compatible with ReCept's other programs, so sales representatives were doing double the work to track and maintain customer demographic information. Visibility between departments was almost non-existent, and because the teams couldn't see what was coming up in queue they lost efficiency and often overlapped their efforts.

A major component of ReCept's company mission is to provide an "uncomplicated pharmacy experience" so they required a solution that not only benefited them internally by opening up communication between management and employees, but also externally to deliver optimal care to customers.

## Technical Situation

Prior to the implementation of Infor CRM and Xbar, ReCept was using an antiquated CRM system which was not compatible with its Outlook programs. The cost and capabilities of the current software had not been properly assessed prior to implementation, so the company was paying for an expensive system that didn't have the functions it needed. Team members lost valuable time creating spreadsheets to supplement the inability to share calendars.

**"It all goes back to what we don't have enough of - and that's time."**

**- Linda Stanko**

Time also was lost when the staff had to reenter missing information. Without shared calendars and centralized customer information, ReCept's management was blind to the progress of its employees and the status of projects.

Customer phone calls felt more like "cold calls" because relevant information was scattered.

Relating to customers with personal, conversational interactions was difficult without comparisons from external data and detailed notes about special topics like birthdays, work anniversaries, etc. Coworkers lacked the knowledge of what happened on each other's calls because of the information gap.

Using a call algorithm, the team tried to maximize its reach, but they were making barely 12 touches per day and the time it took to enter information in multiple locations slowed down the call rate even more.

As a company with a reputation for outstanding customer service, ReCept's CRM inefficiencies were creating a very dangerous problem. Linda Stanko, National Director of Marketing and Inside Sales, knew she had to find a solution – and fast. She started by using the results of an RFP to research multiple tools.

After extensive comparisons, she narrowed it down to four potential tools and found that Infor CRM was the only one that truly "hit the nail on the head" for what her team needed. From there, she contacted co-founder and Technology Advisors (TAI) CEO, Sam Biardo, to take her through the next steps.

## Solution

Technology Advisors worked with ReCept to implement both Infor CRM and Xbar as a new CRM solution. As coworkers saw one another succeed, they wanted to adopt the new system themselves.

**“It’s one thing to implement the tool, but the ongoing support that I received from TAI was instrumental. The level of support, the responsiveness, has made me look back and think that I’ve made the right decision with this tool. It’s been the same way for my team — that support has led to the success of this implementation.”**

**- Linda Stanko**

“Adoption was easy,” says Linda. “The more the team saw the ease of use and efficiencies, the more it increased. One of the contributing factors to success was Paul and Alex [of TAI] jumping on calls and working with people through the support desk to train them and show them the simplicity of the tool.”

The programs integrate with the company’s existing Outlook applications and allow team members to share calendars and tie in contacts from multiple groups. The sales team can now fully utilize mobile features and social media, an important function for those who travel.

serve their clients in a more informed and conversational manner. “When we call an office now, I feel we have the whole picture of who we’re talking to,” says Linda.

Improved visibility between departments created huge efficiencies as well. Departments are now able to coordinate with one another. If a client needs help, ReCept knows who is closest to the area and they can send that representative. The visibility also allows management to view real-time data and catch trends before they turn into a downward spiral. Analytics and weekly activity reports disseminate throughout the company so everyone is aware of what is happening with ReCept’s customer base.

As a result of these improvements, the team has gone from 12 touches per day to nearly 40, and are able to keep track of call frequency through one calendar as well as dashboard and dashlet reminders. More touches mean more revenue potential for ReCept.

## Benefits

Today, the ReCept team is able to collaborate with efficiency, transparency, and structure. The team can serve their customers better with newfound organization and the ability to compare external data.

Internally, departments are connected and management is able to monitor the progress of projects and the time it takes to complete them. “[It’s] raised the bar with what my team can do,” says Linda.

Sales reps are now making more calls, in a more personalized way. Call histories are recorded and can be referenced by other employees. All departments have gained the ability to send emails faster, use tools to track their work, and utilize tickets to assign tasks. With dashlets acting as reminders, team members are always aware of what needs to be accomplished and the timeframe in which they must complete it.

TAI continues to support ReCept’s staff as they enhance their internal communications and manage the success of their customer care.

## About Technology Advisors

Technology Advisors (TAI) is a global business and technology consulting company specializing in the development of Customer Relationship Management (CRM) processes and technology solutions. Since 1991, our customized strategies have helped more than 2,000 businesses increase sales, boost productivity, and improve profitability.

We work with companies globally on consulting, project management, marketing automation, sales automation, customer service and support, field service, call center optimization, analytics, and mobile and social solutions. Our expertise spans a wide-range of markets including government industries, financial services, property, healthcare, manufacturing, and construction.