

CRM Optimization Case Study

“Most people spend more time and energy going around problems than in trying to solve them.”

For nearly a decade, Allturna has been helping healthcare brands optimize multi-channel engagements and investments to improve targeting healthcare providers (HCPs) and patients. Given our experience with a variety of brands and technology platforms, Allturna is often engaged to help clients better utilize the tools and technology they have in place.

Business Issue:

A mid-sized Pharma company had implemented a new CRM platform, but was struggling to derive value from a substantial investment. Allturna's evaluation revealed the firm was using only a fraction of the system's capabilities and the entire investment had been relegated to simply executing batch and blast general content emails. Further investigation later revealed a lack of data management and operational processes were some of the root causes for this limited functionality.

Allturna Approach:

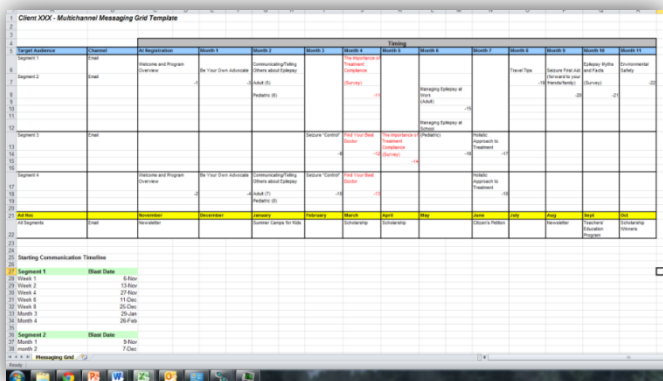
Allturna was engaged to complete a current state assessment, provide a gap analysis, and deliver actionable SOPs to achieve two critical aspects of functionality:

- ✚ Data collection and management processes
- ✚ Campaign planning, setup and execution process

Results and Deliverables:

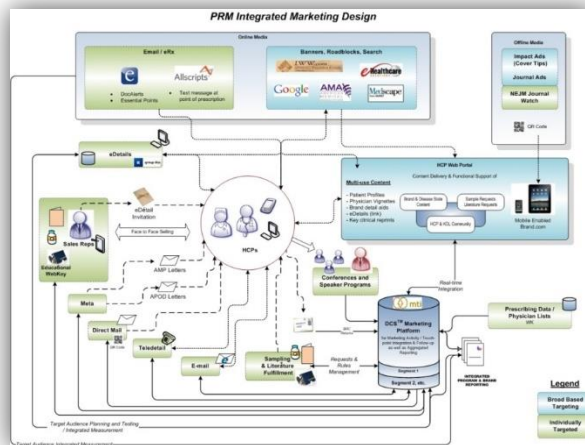
After conducting a series of internal and external stakeholder interviews, Allturna was able to provide the necessary sets of deliverables that would enable achievement of the client's "ideal state" shown below:

Process and Operations Templates



The screenshot displays a 'Client XXX - Multichannel Messaging Grid Template'. It features a grid with columns for different communication channels (Email, Direct Mail, Social Media, etc.) and rows for various segments and campaigns. The grid is used for planning and scheduling communications. Below the grid, there is a 'Starting Communication Timeline' section with a list of dates and corresponding communication events.

Marketing Ecosystem Gap Analysis



Are you getting the most out of your CRM investment? Let Allturna give you an unbiased assessment on opportunities that exist to drive process improvement and brand success.

Contact Us Today to Discuss CRM Optimization
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