

Case Study

Mitra Industries Ltd.

SFA and Case Management for Medical equipment manufacturer

Customer Profile

Mitra Industries are pioneers in manufacturing and marketing of medical diagnostic Kits in India. Incorporated in 1969, the tradition of quality and seriousness of purpose that led to a sterling and harmonious growth, achieving recognition that extended far beyond its frontiers. Mitra Industries is the first company in India to get Drug Manufacturing License for Hepatitis C Tests and also for introducing HIV TRI-DOT. We are working with a specific division of the Mitra Industries that sells haemo-dialysis bags for peritoneal dialysis fro renal patients.

Challenge

Mitra Industries sells predominantly through an extensive network of doctors, clinical coordinators and blood banks across the country. The Mitra sales team is primarily focused on meeting doctors, blood bank dealers across the country and pushing their various products through the dealers and blood bank clinical coordinators. The clinical coordinators are a very important part of the Mitra business model because they are the Case Workers that deal with the patients on a regular basis and the patients are actually dependent on them for guidance and succor. The on-field sales team did not have access to any formal system for real-time tracking statistics of their products and opportunities with the clinical coordinators and the dealers. Also the sales representatives could not easily view the customer data that was outside of their respective areas of contact due to which potential leads were lost.

Mitra Industries needed to empower the Field Sales Force through a simple, easy solution that would allow sales people to track leads, opportunities and sales for various categories & ranges of Mitra products. Most importantly, Mitra needed a more sophisticated tracking mechanism to assure all the related patient information like patients vital stats, medical test results, latest transactions, equipment delivery date, doctor and clinic info. Another equally important element was, for strategic business planning, Mitra Industries wanted to be able to have a real-time picture of sales activity across the country. This would enable Mitra management to track stats and gain better control and visibility on the daily activities of the field sales team.

Solution

PK4 customized the Sales Force Automation model of its flagship product, Impel CRM to empower the operations of Mitra Industries. With Impel's configurable interface, the SFA module was designed to integrate and captured all the necessary patients' details to dealer's data, efficiently in one integrated system. Type-based records and layouts were deployed to automatically generate fields specific to each entity or record; - e.g patient -specific fields were automatically shown on patient records only. Advanced Custom Objects like dependent fields and look-up fields were enabled to track vital stats of patients to keep a track of the patient's health. Also the custom objects were rolled to track the targets of the sales representatives in a centralized formal system.

With an integrated CRM system, the Mitra sales representatives have access to up-to-date, accurate customer information. The field sales person sends in a simple formatted SMS with specific

keywords detailing the sale and the SMS gets directly into Impel updating sales information for each product and the sales personnel. With Impel CRM's Sales Activity Planner, sales managers can now work with their team and plan meetings in advance, set specific goals. Using the Adhoc reporting engine, PK4 designed specific report formats for Mitra's management to get sales insights- individual sales to patients through dealers and also institutional sales to blood banks and hospitals.

Business Impact

- Impel has increased the productivity of the company's mobile workers by enabling access to complete, accurate real-time customer information anytime, anywhere
- Clinical Coordinators can now view and enter vital information related to patients, contacts, dealers with ease with Impel's type-based layouts and advanced custom fields
- The Mitra sales team uses Impel to track the patient migration-in and out of the system
- For a sales team who meet a fixed group of customers/dealers, Impel's sales activity planner has made their visits more productive and efficient and easier for managers to track daily activities
- The sales managers now have direct visibility and real-time reports both of sales person activities and sales at the dealer level
- Impel Adhoc Reporting engine delivers increased visibility into -individual sales to patients through dealers and also institutional sales to blood banks and hospitals by territory across multiple states of Mitra's sales network
- The Ad hoc reports help Mitra Industries to strategically plan their next manufacturing cycle to meet consumer needs.

Impel Roll-out

Configuration

- The Mitra Sales Territory structure and management was completely mapped into Impel
- Ad-hoc Reports were configured for Area, District, Region and National level reporting based on the Sales territories
- Specific reports were configured to be delivered to specific users at End-of-day, End-of-Week and End-of-Month frequencies
- SMS commands for general SFA functionalities were specifically configured to add leads, contacts, activities on the move
- Custom objects to track tenders were configured as per Mitra's requirements, which also help them to track competitor's information in terms of opportunities and tenders
- To easily report, track and analyze expense claims, bills of employees, the expense management module was configured.

Customization

- To track information, based on record type ((patient, clinical coordinator or dealer), Type Based records and layouts was rolled out as per Mitra's business model.
- Advanced Custom Objects and Fields like Dependent fields and Look-up fields were designed to capture data and field correspondences into Impel to cover a wide range of vital customer information. Also custom objects were set up to track expected and real quotas
