

Case Study

Digital Transformation Solution
for an Elective Healthcare
Provider

About Client

Our client is a leading provider of Cosmetic Surgery Services in the Florida market. With a commitment to delivering exceptional patient experiences and results, the Client sought to address several critical challenges in their operations to remain competitive and provide top-notch care.

Problem Statement

- › The Client struggled with an outdated lead management system for tracking leads, which led to the loss of potential patients.
- › Lack of reporting and sales analytics tools and a disjointed sales team hindered the Client's ability to make data-driven decisions and affected collaboration and communication among team members.
- › Also, the Client lacked integrated applications to engage patients and perform customer-centric operations such as scheduling, SMS communication, document generation/e-signature, phone systems, and website forms.

Solution

To address these challenges, the Dextara team executed a comprehensive solution strategy and

- › Implemented Salesforce Sales Cloud to revolutionize lead and patient management, enhance opportunity tracking, and empower the team with robust sales analytics.



› Seamlessly integrated with a suite of essential applications and systems, including:

- Modernizing Medicine for streamlining scheduling and electronic health record management,
- Conga Document Management for document handling,
- Nutterbox Phone System for communication,
- 360 SMS for text messaging,
- Kulturra for Invoicing and Payments, and
- Linked Client’s website to Salesforce for a unified customer experience.

Outcomes

› Better Lead Management:

The Client now has a robust system in place for tracking and managing leads, reducing the risk of losing valuable prospects.

› Enhanced Sales Team Collaboration:

The unified platform of systems and applications improved communication and collaboration among sales team members, resulting in increased efficiency and teamwork.

› Data-Driven Decision-Making:

The Client team can make informed decisions using analytical insights on their patient data, and other key performance indicators.

› Streamlined Operations:

Integrated applications for scheduling, document management, communication, and website interactions have simplified various operational processes, reducing manual errors and efforts.

› Scalability and Consistency:

The platform’s readiness for expansion enabled the Client to replicate their success in other affiliated practices, ensuring a consistent and efficient framework for sales and CRM.

40+

Clients

4.9/5



AppExchange

70+

Active Projects

