

“When it came to working with our team, especially our IT Manager, Koorb ticked the boxes nicely.”

– Aaron Rackham, Director of Medical Markets, USL Medical



# USL Medical – equipped for the future with Microsoft Dynamics CRM

USL Medical is a privately owned company focused on becoming a world-class supplier of innovative healthcare products and systems to the New Zealand market.

From selling products from the back of a van 30 years ago, USL Medical now has over 100 staff. Their customer list includes primary care, aged care, DHBs, sports organisations and physiotherapists and rehabilitation facilities, through to pharmacies and retail.

USL Medical values and advocates face-to-face contact, and their team of over 30 geographically dispersed sales people and product managers maintain high levels of personal contact with customers. The company also believes in allowing their people to work in the way that suits their professional style and comfort level. This produced great results, but also meant customer information was stored in an equally dispersed range of formats and locations. Some relied on memory. Others created their own Windows folders, documents and spreadsheets. Some used emails for record-keeping, or others kept up traditional business diaries for appointments and used card indexes for customer contact details.

This presented a range of challenges for Aaron Rackham, Director of Medical Markets for USL Medical and part of the CRM project team. Without a centralised repository for customer and sales information it was hard to see their sales performance and provide good reporting on activities and opportunities.

USL Medical recognised some time ago that they needed a CRM, but they held back from committing to a new IT solution. The company had previously burnt their fingers during an IT project which experienced large budget blowouts without delivering value. They were in no hurry to expose themselves to further risk, and gave other business projects, including updating their warehouse technology, first call on their time, attention and budget.

## Team work

For Rackham and the rest of the management team, over and above the obvious functionality it would deliver, the overriding priority for a new CRM system was value for money. USL Medical formed their own CRM project team for everyone who would have a stakeholding in the outcome.

The team worked together on a list of what they wanted and expected from a CRM.



Industry: Medical equipment  
Project Type: CRM implementation

### Quick Facts:

**Website:** www.uslmedical.co.nz

**Customer Size:** 100+

**Solutions:** Microsoft Dynamics CRM

**Users:** 40

**Year:** 2014

### Benefits:

- Centralising all sales data and customer information to remove reliance on dairies, emails, and individually maintained folders and spreadsheets.
- Streamlined sales reporting from a single consistent and accurate source of information.

- Automated workflows for sales team to step them through the tasks and reminders and prompts which turn opportunities into sales.
- Higher level of sales transparency through custom reporting.
- Ability to track individual sales figures versus budgets, activities and performance.

Then they invited half a dozen potential software implementation partners, each with a different solution, to pitch for the project. “For us it wasn’t just what the system could do,” said Rackham, “but also the cost, the partner, and the support they were able to provide - not only now, but in 5 to 10 years down the track.”

Integration and compatibility with their existing software platforms was also another key factor. USL Medical use a Microsoft Dynamics ERP and range of other Microsoft productivity tools, like Outlook and Excel. They opted for Koorb, a Microsoft Dynamics CRM Gold Partner, because of the impact their solution’s native integration had on short and long term project costs. “Cost was an important consideration,” said Rackham. “We needed to make sure that we weren’t going to have any hidden costs that were going to come out and bite us. And with Koorb, there haven’t been.” Ease of use was also a factor, given the varying comfort levels the team had with technology. The company’s IT Manager was designated a high level of involvement in project managing the implementation, so his level of comfort with the chosen partner was critical as well.

Rackham has nothing but praise for Koorb’s CRM consultants. “When it came to working with our team, especially our IT Manager,” he said, “Koorb ticked the boxes nicely.”



## Selling to sales people

Rackham supports the company philosophy of allowing the sales team to manage their individual customer relationships in a way they find comfortable. However the productivity offered by their laptops and smart phones was often underutilised and there was a heavy reliance on hard-copy diaries to maintain appointments. “We’ve seldom had problems,” Rackham said, “but it was time to get with it, time to bring us all up-to-date.”

## Ready to roll

While the sales and product management team was excited by the prospect of the CRM, this was tempered by a concern that it might create more work and complexity than it mitigated. To avoid daunting the less tech-savvy members of the sales and product management team with the full solution functionality, a pilot version was rolled out in the first month, allowing them to become familiar with the basics of CRM. This, and three days of initial CRM training at a USL Medical conference, laid most fears to rest.

## A consultative approach

USL Medical was keen for full team involvement in the implementation, so staff would feel ownership as well as having a deeper understanding of the solution. “Koorb responded with what we thought was a very mature and consultative approach. They advised what we’d need to do, and how to do it,” said Rackham.

USL Medical now has eight in-house CRM champions, a result they don’t feel they would have achieved by handing the whole project over to a partner.

## A bright forecast

Sales reporting is now a far more streamlined activity for USL Medical. Previously, the company used a Word document, updated manually, section by section. Sales team report content was collected from hand-written diaries, and the amount of detail available varied from person to person. Inconsistent information made reasonable visibility of monthly activities difficult, nor did it highlight cross-over opportunities.

With Dynamics CRM, USL Medical’s sales team now have automated workflows to step them through the tasks and reminders and prompts which turn opportunities into sales. Koorb’s custom-built report combines opportunities, tasks and appointments all in one place, providing a much higher level of sales transparency. Individual sales figures versus budgets can be tracked, and managers can see their team’s individual activities and performance.

“We have a busy team,” said Rackham. “We’ve got a pile of product managers and key account managers, all crossing over, day in and day out. There are lots of activities, often with multiple points of contact within each customer organisation, lots of quotes and a high level of transactions and opportunities. Looking back, we really weren’t getting the level of information that we needed.”

Sales forecasting had always been a robust process within USL Medical. Budgets were completed annually based on the history of the previous 12 months, along with new opportunities and customers, and new product agencies. “The team are already using the CRM for appointments, and they are definitely entering in the opportunities,” Rackham said. “My latest report shows \$6.4m in potential opportunities. \$6.4m. That’s a lot of opportunities!”

“As long as people are keeping the CRM up-to-date there’s no guesswork anymore. It’s right there, information at the touch of a button, and I think that’s going to definitely help us. Will CRM create opportunities for us? Of course not, we need to do that ourselves. But what CRM can do is help us convert them.”

## Happiness delivered

Rackham is very happy with the outcomes so far, and sees the value both Dynamics CRM and Koorb deliver.

While threatening a diary-burning party in a couple of months to make the transition final, the data populating the sales activity reports shows Rackham that most of the team embrace CRM in their day-to-day work activities. That’s a win as far as he’s concerned. And he’s still smiling about the \$6.4m of opportunities.

Koorb delivering the project on time and within budget has ticked more than just one box.

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## About Koorb Consulting

Koorb Consulting a 100% New Zealand company, privately owned and operated by the Directors, Nicholas Birch and Paul McDowell-Hook. Both Directors work in the company.

The company was established over 14 years ago and has offices in Auckland, Wellington, Christchurch and Dunedin.

The main focus of our business is implementing and supporting Microsoft Dynamics AX (Gold Partner), Microsoft Dynamics CRM (Gold Partner), Microsoft Business Intelligence (BI) Solutions (Gold Partner) and Microsoft SharePoint (Silver Partner). With a

team of over 85 certified and experienced consultants this makes us the largest practice of our kind in New Zealand.

Our customers can have full confidence in our wide-ranging expertise and proven solution delivery. We have implemented and are supporting over 60% of all Dynamics AX customers in New Zealand. We also support customers in Australia, the Americas, Europe and Asia.

Our success is a direct reflection of our strong leadership, highly experienced people and proven methodologies.

### Microsoft Partner

Gold Enterprise Resource Planning  
Gold Customer Relationship Management  
Gold Business Intelligence  
Silver Collaboration and Content



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