



MOBILITY & ACCESSIBILITY

{ a method:CRM success story }



Overview

When a hospital contacts HealthLinc for medical equipment, it is usually demand-based and time sensitive, so quick turnaround is a key factor for HealthLinc's success. Recognizing a need for a modern equipment tracking and customer management system, Cameron Fleming and the HealthLinc team challenged Method:CRM to create a personalized system for the multi-division business. With in-house and on-the-road staff embracing Method:CRM, HealthLinc has:

- reduced work order times by 20-30%
- 30% increase in deliveries and technical services
- improved customer ordering experience through a Customer Portal

The Challenge

Organizing a multi-division company on a paper-based system was increasingly becoming a problem for business owner Cameron Fleming. He knew that tracking rental equipment through boxes of records was not efficient or scalable for the growing demand for HealthLinc's services.

In addition to needing an updated tracking system, HealthLinc required a whole new way of receiving, processing, and invoicing orders. Everyday, the HealthLinc staff processed equipment orders from British Columbia's health authorities and hospitals. However, Cameron's team was receiving handwritten orders via fax, leaving ample room for illegible requests and increased administrative requirements to input the orders.

Misinterpreted client information was also slowing down the HealthLinc technicians, who are responsible for delivering and servicing rental equipment. Slowing down the delivery process decreased the number of customers HealthLinc could get to on any given day.

Changing work order processes internally was Cameron's first task, but he was also determined to find an alternative for how hospitals and therapists were placing orders with the business.

An outdated and disorganized way of conducting business was no longer an option for HealthLinc. Cameron sought out an adaptable, web-based solution that could increase operational efficiencies and improve HealthLinc's level of service throughout the multiple divisions of the business.

The Solution - Method:CRM Pro

Acting on the advice of his IT staff, Cameron chose to work with Method:CRM and rolled out the platform to the entire HealthLinc team. Today, the company provides quotes, creates work orders, sends invoices, and schedules a team of technicians all within Method.

"It's really the lifeline of everything that happens in the company," Cameron stated. With increasing operational efficiency at top of mind, Cameron was also excited by Method's integration with QuickBooks. "Having Method communicate with our accounting software means that there's just an easy flow — we execute our orders and then magically they translate into our accounting system."

Cameron especially likes the adaptability and customization possibilities of Method:CRM. With the help of a dedicated Method consultant, Cameron created a customized Method:CRM Customer Portal, which acts as an online form for hospitals and therapists to order equipment, replacing handwritten faxed-in requisitions.

"So far, my Method consultant has been able to accommodate any request I've thrown at him. We're killing multiple birds with one stone through this point and click Customer Portal. It's huge for both sides — it's a win win."

The project is the first of its kind in Cameron's industry, reducing the administrative work of his staff and improving the purchasing experience of his customers.

"The therapist logs into the portal, selects the required equipment, clicks submit and all of the information is captured in Method:CRM and queued for confirmation. The therapist receives a copy of the order, and can view all past and outstanding orders for multiple patients on their dashboard — instead of having 18 folders the therapist now has a single portal screen. And because the customer portal timestamps every submitted order, I can track order completion timeframes, and identify where further improvements can be made in the process."



Business Benefits

Prior to operating within Method, HealthLinc struggled through an ineffective order process that involved rifling through files for proper pricing, calculating values, and applying discounts. Working within Method has allowed the HealthLinc team to tighten up internal processes, which has had a positive ripple effect throughout all areas of their business.

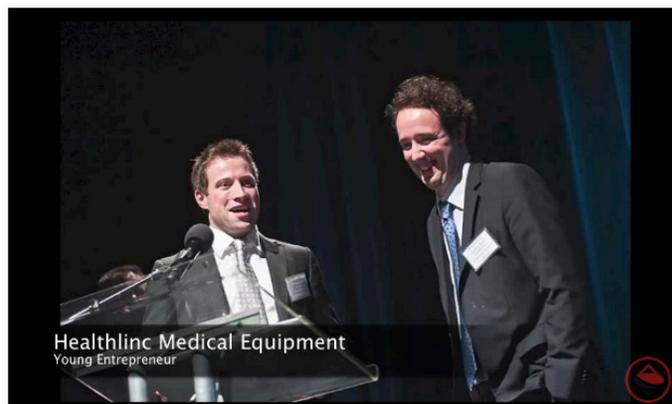
"We've cut down each order by 20-30% of the time it used to take, so we're actually able to process so much more on any given day and get that much more business," Cameron reflected. Having their Method:CRM account sync with QuickBooks also means that their processes have been simplified for accounting staff.

“Generating the required data has been cut down by two thirds and retrieving data has become easier for our accounting team. Instead of having someone managing all the paper-based systems, we’ve been able to manage accounting with a team of one or two. Method has allowed us to grow without additional manpower and we can judge our staffing needs based on looking at what happened on this day last year within Method.”

Method:CRM has also improved HealthLinc’s speed of service and accuracy for the company’s mobile technicians. Since the team can now effectively track rental equipment and schedule service requests, HeathLinc technicians find their daily schedule and the list of required equipment ready for them when they arrive each morning.

This improved level of organized scheduling, combined with the technicians’ mobile access to customer information, has resulted in speedier delivery and happier customers.

“Having a cloud-based CRM is critical for our business — when serving hospitals, hours do count. And because we are now able to execute orders on the road or contact therapists, we can get to people that much quicker.”



About HealthLinc Medical Equipment Ltd.

HealthLinc Medical Equipment Ltd. has grown to become one of the largest independent dealers of Mobility and Home Medical Equipment in the Lower Mainland of British Columbia. HealthLinc is active in rehab sales in addition to managing multiple Palliative, Home First and other equipment rental programs in both Vancouver Coastal and Fraser Health Authority regions.

method:CRM

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