



# SalesFix

## BUILDING THE TECHNOLOGY TO SUPPORT COGNITIVE INSTITUTE'S BUSINESS GROWTH



### KEY BENEFITS

#### UNIFIED

SalesFix created a management framework to unify 3 separate streams of data across finance, sales and event management. Cognitive Institute can now analyse their critical data to grow their business.

#### COMPREHENSIVE

All Cognitive Institute data is now in the right format and available at the right time. High level events now encompass a huge variety of options. Business specific reports can be created for staff to generate new leads..

#### QUALITY ASSURED

Trained system administrators control access to data at every level. The quality of data is now assured, and key validation rules are established to unify all Cognitive Institute data.

*"SalesFix really made the effort to understand our business and they had an excellent understanding of how Salesforce would support our outcomes."*

Lynley Mangin, Corporate Services Manager, Medical Protection Society

### CLIENT

Cognitive Institute is the education and training arm of the Medical Protection Society, the world's leading protection organisation for doctors, dentist and health care professionals. In Australia, Cognitive Institute has 20 staff in the Brisbane office.

They offer courses on-site at hospitals and online to health professionals. Each year 12,000 clinicians across 10 countries attend Cognitive Institute designed courses, presented by more than 100 doctors, dentists, nurses and allied health professionals.

### THE SITUATION

Crucial processes were cumbersome and scattered across multiple systems and files leading to poor integration and reporting. Processes for capturing information or undertaking basic workflows were complex and time consuming. In addition, standard processes were not documented, trained or enforced and reporting capabilities were poor or non-existent.

So much staff time was being lost on frustrating workarounds, and we needed to address that - both from a business and staff satisfaction perspective," says Lynley. "We needed a management framework that would enable us to host all critical data in one place, and support our expanding business.



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## THE CHALLENGE

"Our existing systems were built on old technology that could not be developed any further," says Lynley. "We are also undergoing significant growth, and need the technology to support us through that while using existing resources."

Once Salesforce was identified as a potential solution, we then sought local providers who understood what we were looking to achieve, and who were realistic about that, given time and budget constraints.

SalesFix really made the effort to understand our business," says Lynley.

While the essential scope remained the same, many details changed over the course of the project. "During implementation, we found SalesFix were able to provide valuable guidance on solution structure. For example, if we requested a change, SalesFix would often query the background and provide alternate advice that improved outcomes."

## RESULTS

*Cognitive Institute is now able to work on their core business requirements (sales and event delivery), and to increase growth without increasing their resourcing.*

*All Cognitive Institute data is in the right format and available at the right time. Useful information is stored in a simple and logical format against relevant records, and trained system administrators can control access to data at every level.*

*Cognitive Institute can now create a high-level event to encompass a variety of options such as budgeting, scheduling and allocating presenters resources. Relevant business specific reports are available, and future opportunities by stage can be generated for staff to pursue.*

*In the short term, Cognitive Institute is working to replace non-integrated systems and improve functionality and processes. In the long term, the updated Salesforce instance will improve how Cognitive Institute engages with clients, participants, and the contract faculty, and streamline many processes that grew around older technology.*

*Initial feedback has been overwhelmingly positive and users are keen for additional gains to appear as Salesforce becomes more bedded down and further workflow is completed.*

*"SalesFix and their consultants are fantastic to work with. We're looking forward to continuing our relationship to further develop and extend the system," says Lynley*

## THE IMPLEMENTATION

Cognitive Institute's processes were separated across unlinked finance, sales and event management systems. This original, bespoke system was built on technology that is no longer supported.

Over 3-5 days, SalesFix reviewed Cognitive Institute's processes and developed recommendations for an event management & CRM implementation. "Their experience in a lot of other fields also enabled us to develop the new systems we required efficiently and affordably", says Lynley

Project scoping focused on client data, supplier data, product data, and event hosting.

Sales staff progressively began working on the new Salesforce system while still running all Cognitive Institute events as usual, requiring additional short term resourcing and exceptional effort from Cognitive Institute staff plus additional consulting time from SalesFix.

## THE SALESFIX SOLUTION

Phase 1 involved setting up Salesforce as a sales tool. Phase 2, creating and configuring Cognitive Institute's events management system, was crucial to the success of the overall project.

Following the setup of Salesforce standard objects, SalesFix created automated workflows and put rules in place to allocate resources and people to sessions and events, plus the ability to track payment; business reports were then created to analyse the new, unified flow of data.

Cognitive Institute's data quality assurance was vital. SalesFix established key validation rules to unify all Cognitive Institute data, and created roles and role hierarchy, user profiles and object permissions.

SalesFix then identified and trained Cognitive Institute's users across event management, system administration, and selling opportunities.

