



SalesFix

BRINGING ACCESS AND VISIBILITY THROUGH COLLABORATION



KEY BENEFITS

COLLABORATIVE

Through enhanced "real time" entry and access of data by on-the-road and remote team members, Provider Assist has addressed data visibility across their organisation. This has allowed team members to invest more time on client relationships and engagement instead of recording information for entry on their local system.

STANDARDISED

Data entries on a local server, previously logged in various styles, are now entered in "real time" using a standardized format all team members can understand, with no need for cumbersome weekly updates. The Salesforce cloud based system has a myriad of benefits and ensures all users have the latest information to hand regardless of their location.

FOCUSED

Double handling of information has been eliminated, allowing for increased time spent with each client. Rather than investing time transferring entries to the office system, all entries are now done on-the-road. The Provider Assist team have all benefited from the implementation and legal agreements can now be generated without delay.



"The collaboration with SalesFix has resulted in all data being structured, clean and in a visible format".

Aaron Tabone, Champion of Information and Systems, Provider Assist.

CLIENT

Provider Assist are Australia's Premier Aged Care experts. They provide assistance to over 50% of the Aged Care facilities across Australia. Their aim is to support their partners to provide the best possible care to older Australians. Provider Assist's support spans Australia's Capital cities and services regional and remote outreach areas. Since 2002, Provider Assist has developed their services to an enviable range of comprehensive care and financial solutions, including Allied Health and ACFI expertise.

THE SITUATION

Provider Assist already a leader in their industry, had identified shortcomings in their original system. The existing system was custom built and perfect for management within the office environment, however it wasn't readily sharing data and was difficult to access if you were not in the office. Performance and accessibility issues were resulting potential opportunities being lost or activities delayed or hampered.

After being introduced to Salesforce, Provider Assist knew this was the platform they wanted to implement in to their business, so they set about finding the right people to work with. After extensive proposal analysis, assessment of cultural fit and technical knowledge, the project was awarded to SalesFix and the consulting and implementation process began.



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THE CHALLENGE

Before Salesforce was implemented, Provider Assist encountered daily data visibility and accessibility issues and yet Provider Assist had well documented processes, a custom built in-house system and an enviable business model. However, Management knew it could be improved and knew what they wanted to achieve. The key aim was to find a company who could not only meet their system implementation needs, but were genuinely willing to learn about what they did and the issues they wanted to overcome. Provider Assist was open to a company also advising them on other features and benefits they could include.

Provider Assist needed their team members to have "real time" access to data, no matter where they were located, at any given time. The data needed to be streamlined and easy to understand for every user.

RESULTS

From a local server that was large and bulky and difficult to access unless you were on a laptop in the office, to a cloud based system, Provider Assist are able to better support their remote clients and team members and optimize time on the road. With an Australia-wide team Salesforce has made Provider Assist more mobile with information available from anywhere. Provider Assist now houses its data and contact information in a sleek and user friendly, cloud based system, easily accessible and visible to all.

The change has allowed for the reduction of turnaround times, 'real time' access and entry of data and more time to spend engaging their clients. The Provider Assist sales team especially love Geopointe, which allows them a visual mapping feature to support their activities.

"SalesFix has not only exceeded Provider Assist's expectations on this project, they stepped in to rescue another project and turned what could have been a very stressful situation into an enjoyable one," Aaron Tabone.

"We wanted to ensure that we chose a company who were genuinely willing to learn about our business," said Aaron Tabone, Provider Assist. "SalesFix rapidly understood our business and what we needed".

THE IMPLEMENTATION

Everything in the business needed to revolve around this software. There were numerous tools and applications that needed to work seamlessly together to allow access by a diverse selection of teams, all requiring different data with different priorities. For example, Clinical, Sales, Operations and the Supplements Division.

Salesfix Consultant Alexandra was the Consultant onsite with Provider Assist and Aaron Tabone stated that their experience *"Couldn't have been better". "Alexandra genuinely listened and rapidly understood what Provider Assist does and what we needed,"* he continued.

SalesFix challenged Provider Assist's processes which resulted in an "amazing outcome", with benefits that Management hadn't even envisaged were possible. For example, some of the added features Salesfix implemented have given Provider Assist's financial team members greater visibility and understanding when forecasting for the Sales team. A collaboration of departments that is invaluable for the business and its profitability as a whole.

"I see SalesFix as a true long-term partner, they always looked for the best solution and their philosophy fitted us perfectly," Aaron Tabone.

THE SALESFIX SOLUTION

Before implementation, Provider Assist's Filemaker system was placing restrictions on the team in terms of access of data. Using Salesforce, coupled with the expertise, culture and exemplary team at SalesFix, the solution has been an undeniable success at every level. In fact, Provider Assist were so impressed with Salesfix the project was extended.

Provider Assist's Road Map is between 18 – 24 months, however they already have reaped the benefits and value from this project.

"Already the benefits and value has been astronomical, but as we gain more insight and our business continues, this will increase. SalesFix has become an extension of our team," Aaron Tabone, Provider Assist.