

Implementing Today's Growth with Redpath Salesforce Solutions

galileo

THE CHALLENGE

Galileo is a software-based health care business. They use mobile technology with user-centered design to provide around-the-clock mobile access to customer medical care and expertise. Initially, all of the company's accounts, contacts, opportunities and products were maintained and documented in spreadsheets. This limited their reporting capabilities due to flat and unrelated spreadsheet data. These limited capabilities also forced Galileo staff to generate and verify product schedules for their finance department, which made it challenging to create accurate annual revenue models from employee and monthly sales forecasts. Lastly, they had issues with email correspondence across multiple email boxes due to disconnection problems.

THE SOLUTION

To assist Galileo, Redpath implemented the following solutions resolve these inefficiencies:

- Created a customized Salesforce object based on Galileo's business processes to include custom fields and record types
- Appropriate data was identified and uploaded into Salesforce
- Created objects with master-detail relationships
- Customized fields to capture health and account level member data
- Provided training materials on how to create reports and dashboards
- Set up revenue and product quantity schedules
- Designed reports for sales and finance teams
- Implemented Gmail integration and provided materials to get the sales team up and running with solution

THE RESULTS

Using Redpath's expertise in Salesforce implementation, Galileo is now able to:

- Reduce the use of spreadsheet data and increase effectiveness
- Create synergy for sales teams to cohesively work with accounts, contacts and opportunities
- Quickly locate data and keep it up to date
- Maintain and track health plan and member data as part of the account record
- Enable the Chief Commercial Officer (CCO) to create reports and dashboards for sales team executives
- Avoid manually creating product schedules and reports
- Attach emails to Salesforce accounts, contacts and opportunities
- Review emails and information shared across sales and executive team members.

YOUR PATH TO SUCCESS

Redpath has proven Salesforce services and methodologies to help your team identify the digital strategies to transform your Business Processes and Customer Journey. Reach out to us and we can discuss your best path to success.

"Redpath was great to work with. They scoped the project perfectly and Sandra was an absolute joy to work with."
- Mike S.

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