

# Huntleigh Technology: handheld CRM in action

Selling to the National Health Service (NHS) can be a challenging business, even for companies that have been doing so for 30 years. The emphasis on value for money, quality standards, transparent public procurement procedures and changing customer requirements combines with multi-tier purchasing processes and multiple

customer contacts to create a complex and multi-stranded process. For suppliers to the NHS finding a balance between selling and maintaining relationships with multiple contacts has led to the requirement for creative and instantly accessible Customer Relationship Management (CRM) tools.

Huntleigh Technology PLC is a United Kingdom based group serving the global healthcare industry, employing more than two thousand people and active in over 120 countries. It is a market leader in the provision of patient care products including pressure care products, patient positioning and transportation equipment and a variety of preventative, diagnostic and monitoring applications.

Paolo Beato, Group IT Director for Huntleigh Technology, said: "The NHS has a duty to deliver value for money, quality, execute transparent public procurement procedures and meet patient needs. But the obvious consequence of this is that any purchase involves numerous parties who may be seen all at once, or separately, and this is very hard for sales people to track. Our new system puts customers at

For Pythagoras, the solution was to choose a system with proven technology and flexibility that could be integrated with Huntleigh's existing business to business systems. SalesLogix met this brief and was also highly customisable to meet specific needs. It had been designed for internet and wireless technologies and was easy to use leading to a high level of user acceptance and usage. SalesLogix also allowed Pythagoras to deploy the new system quickly and cost effectively and roll out changes remotely on the handheld. This meant that Huntleigh's sales team would be able to access information faster, have access to client information on Blackberry, and their visit history was recorded together with historical order information.

## Project objectives

With such a diverse and complex product set and a highly trained team of over 700 sales and service personnel, including 250 on the road, Huntleigh's IT department was looking for an IT solution that allowed their field sales force to keep track of relationships with extended decision-making teams within the NHS while at the same time delivering significant business benefits, which broadly fell into three types:

- **Improve Responsiveness to customer requirements**
- **Customer retention**
- **Cross/up selling**
- **Management reporting**
- **Activity management scheduling**
- **Increase Customer satisfaction**
- **Sales meeting productivity**
- **Sales**
- **Reduce Reliance on office-based support staff, usually to provide information over the phone**
- **Customer churn**
- **Cost of sales**
- **Duplication of effort**



the heart of our business and enables us to meet their needs better, and at the same time generates major operational benefits for ourselves."

Huntleigh's decision to work with Pythagoras Communications, the UK's leading independent integrator of sales and marketing customer relationship management solutions was based on Pythagoras' extensive knowledge of creating bespoke CRM solutions and their ability to meet Huntleigh's very specific set of requirements.

The first major task for Pythagoras was to scope the requirements and this was achieved through working closely with key end users at Huntleigh to a fully understand their needs from the start. The second part of the process involved Pythagoras undertaking a very significant level of customisation and bespoke development to create a solution that met Huntleigh's very complex customer structures and also to develop a 'single customer view' that allowed for the fact there may be several sales teams from various Huntleigh Group divisions selling to that specific customer.

In particular, the screen designs for the PDAs needed to be user friendly, which on small screens proved to be a major challenge. Because other issues

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models with a larger memory and by being realistic about the type and amount of data needed.

While the customisation by Pythagoras was time consuming, Huntleigh and Pythagoras both acknowledge that creating a tailored solution was crucial to the success of the implementation.

### The Solution

Twelve months after the project began, Huntleigh's solution comprises a customised CRM handheld solution deployed on RIM Blackberry devices and laptops. It has successfully met its objectives of:

- Continuous access to real-time information
- Visit history
- Current order information
- Historical order information
- Invoice, Credit and Debit information
- Remote access to client information, reducing preparation time and increasing average number of sales meetings per day
- Remote updating of database providing management with a continuous, accurate situation update
- Activity management: actions for sales and support staff resulting from meetings can be allocated immediately and tracked.

### Deployment

Huntleigh is presently deploying the solution in phases rather than as a 'Big Bang', having determined through user dialogue that this is the best way to achieve universal acceptance of the new system.

Already, there are some 110 sales people using the system in the UK, of which around 70 are Blackberry-only users. Huntleigh plans for all sales people to be equipped with both Blackberry devices and laptops in the short to medium term; this will provide convenient access to email and SalesLogix CRM on Blackberry, but also the greater usability of the laptop when time is less critical or a lengthier email is required. There are also 40 users of the system in Australia, and many others throughout Huntleigh's 35+ companies working with the system. Many further handheld users will be equipped in the USA shortly.

As well as a country-by-country roll-out, functionality is also being introduced in stages. Stage one includes contact and activity management, while stage two includes opportunity management and marketing. This is intended to acclimatise staff to using the new system.

### Measurements of success

Because Huntleigh previously relied largely on paper-based systems to manage its sales process – and across multiple teams and even across companies in the Group – it did not start from a perfectly 'measurable' situation. But today, the reporting capabilities of its SalesLogix CRM system mean that the company now has the infrastructure to set targets for, and measure progress towards, operational improvements.

### Summary

Huntleigh's IT department set out to improve the operational efficiency of the Group's sales activities and provide real business benefits; it did not set out solely to implement a handheld CRM solution. However, having determined that a

mobile CRM solution would deliver the benefits it required, Huntleigh also realised that, to be successful, the solution must be tailored precisely to the needs of the company.

Paolo Beato, Group IT Director at Huntleigh Technology added: "We are already seeing the benefits of enhanced reporting capability and the access to real-time information which allows us to be more proactive in our customer relationships. As we continue to roll-out the program I'm sure we will see tremendous business benefits across all areas of our operations."

This customisation was undertaken by Pythagoras Communications, the UK's leading integrator of sales and marketing customer relationship management solutions. The result is a software 'vehicle' from which Huntleigh can begin to make specific, targeted improvements to its business, while putting the customer at the centre of the process.