CRM Case Study- Sanacorp

Centralized sales management in pharmaceutical wholesale

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Sanacorp Pharmahandel GmbH, one of the leading pharmaceuticals wholesalers in Germany, relies on the PiSA sales CRM solution for centralized sales management, marketing management, and customer-service operations. Mobile access puts CRM data at the permanent online and offline disposal of the company's field staff.

Customer & sector

Sanacorp Pharmahandel GmbH is a leading pharmaceuticals wholesaler. For more than eighty years now, its core competency has been the comprehensive and cost-effective supply to pharmacies of medicines and healthcare products. The cooperative structure within which the company operates and the supply mandate inscribed in its corporate statutes forge a unique kind of supplier-customer proximity between Sanacorp and the pharmacies with which it does business. Cutting-edge logistics solutions and an efficient system of delivery enable Sanacorp to transact as many as four deliveries each day to around 9,000 pharmacies from its 16 supply centers around Germany.

Initial situation & challenge

Having successfully introduced the PiSA sales CRM system for centralized campaign management, Sanacorp realized the importance of also replacing its existing sales-management system with the PiSA sales solution and adding mobile connectivity for its field staff. The new sales-management system needed to satisfy the following complex criteria:

- ✅ representation and evaluation of sales and income figures for every single phar-macy
- ✅ presentation of an extensive range of indicators per customer
- ✅ organization and administration of the total stocks held by customers spread around the country by allocating IMS (Institute for Medical Statistics) regions to area managers
- ✅ representation of the entire sales struc-ture of pharmacies, area managers, branch offices, cooperation network, re-gions, and headquarters contained in the CRM system plus mapping and evaluation of the relevant indicators
- ✅ replacement of existing mobile solution for field staff with the PiSA sales mobile CRM system
- ✅ document management, for billing, etc.

As the direct point of contact for pharmacy owners, the area manager is a key figure within the Sanacorp sales concept. That is why mobile access to up-to-date customer data is essential to the customer-support process. The challenge was to map out complex, hierarchical mechanisms for access to customer data for the individual area managers as part of the expansion of the PiSA sales CRM system already in place.

Project course & solution

Once the sales objects and the complex sales structure had been set up on the company's CRM system, it was possible to produce data sheets and statistics of the various indicators for each customer. Different ways of looking at the indicators now allow the company to just as easily examine developments from an historical perspective over the past two years as make comparisons between individual pharmacies in their respective settings.

The drill-down solution created for this customer enables evaluations on any level of the sales structure, making this an invaluable tool both for the area manager to whom the pharmacies are allocated and the regional heads who, for their part, are able to assess and steer the given situations in their regions.

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Introduction of the mobile version of the CRM system permits independent access by the field staff to all needed customer information (in preparation for customer meetings, for example). The sales structure serves as a basis on which the office staff can prepare listings of pharmacies for their field colleagues, which listings include references to items of data such as revenue figures, a history of customer meetings, terms and conditions, etc. This data is supplied daily in the CRM system for around 10 notebooks and is synchronized to the mobile system via field-staff web access. A powerful interface is in place to transmit the huge data quantities involved.

Comprehensive and highly complex access mechanisms, as defined by the hierarchy of the sales structure, have been incorporated into the system. Detailed customer files provide the field staff with vital information (such as the terms to which a customer is subject), facilitate the composition of flexible reports, and enable the staff to always be well-prepared for impending customer meetings. Contact reports can be entered directly into the system structure, where they will be documented and made available for evaluation purposes. Once data has been synchronized, it is transmitted to the central customer-service office for further processing and automatic distribution in accordance with the respectively designated competence.

The mapping out of a ticketing system as part of the third phase of CRM system development at Sanacorp saw the completion of a 360° perspective on the customer. We specifically adapted the Service module already in place as part of the standard PiSA sales system to the needs of the company. The customer-service unit at Sanacorp now enters incoming servicer inquiries or complaints directly into the system. The system then creates tickets that can be on-forwarded and tracked. Every member of the sales staff can view the tickets for their particular area of responsibility via their personal user cockpit.

Successes realized

The PiSA sales CRM solution opted for by Sanacorp is a stand-ardized, company-wide soft-ware solution for the company's sales, marketing, and customer service outfits as well as its returns- and order-processing and its warehousing operations. This solution has eradicated virtually all system and media inconsistencies. Targeted sales management now enables the comprehensive evaluation of detailed indicators in accordance with the sales structure and on any desired level: by individual pharmacy, area manager, branch office, network, region, or at the corporate level. This allows the various organizational levels to be either individu-ally or jointly steered and controlled.

Sales operatives are given dedicated access to information and hierarchically allocated customers depending on which part of the sales structure that individual is attached to (based on their role as an area manager, head of field office, or regional head, for example). Regular synchronization between the head office and the mobile CRM system provides operatives with constantly updated information about any customer-relevant changes or activities, allowing them to respond accordingly and in a timely manner. The operatives conversely provide information to their colleagues, thereby likewise ensuring the reciprocal flow of information at all times.
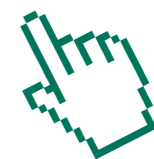
For its marketing activities, Sanacorp uses a highly effective solution adapted specifically to the particular needs of promotion marketing. As a result of using this system, the company has been able to reduce its expenditures for work preparatory to promotion campaigns, to make its processes more efficient, and to achieve full transparency.

The complaints management and ticketing process enables Sanacorp's customer service unit to respond to customer complaints or information provided by customers in a timely manner and thus to sustainably raise the level of customer satisfaction.

> *The PiSA sales solution has become a strategic core application within the Sanacorp IT landscape. It gives us the exceptional flexibility we need to address our individu-al needs. Our working relationship with PiSA sales is a trusting one, and we much appreciate the highly professional approach the company takes.*
>
> Norbert Magdalena,
> Senior Sales Manager and Stragic Product Management

We will be pleased to advise you!

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