

## Case Study

# Dynamics CRM Implementation and Power BI Integration Helps a Medical Device Company Enhance Clinical Efficiency and Reduce TCO by 70%



## Customer Overview

### Customer

A public medical device company

### Profile

The client is a market leader in Transcranial Magnetic Stimulation (TMS) for the treatment of major depressive disorder and other mental health conditions.

### Industry

Medical Equipment Manufacturing

### Services

Dynamics CRM and Power BI

## Business Need

The medical device company's strategic vision is to transform patients' lives whenever and wherever they need it with the best NeuroHealth therapies in the world. However, as business needs evolved, the marketing team lacked visibility into operations, impacting lead-to-conversion rates.

- The client had a team of resources to manage its technology infrastructure. However, this team lacked experience and expertise in multiple areas, including CRM, Power BI, and app dev.
- Inconsistent data, undefined business processes, and data flows across business-critical information reduced employees' efficiency.
- Using spreadsheets to manage their sales pipelines increased the burden while reducing productivity and time-to-market.
- Partial data consolidation from various sources and ETL jobs written over the years by different team members as per just-in-time requirements caused several data quality and management issues.
- Business processes and System of Record (SOR) for various business functions were not optimum.
- Reports were built triggered by need and did not go through the classic dev, QA, and prod cycle. They were also generated from two databases without reports/ETL/sources documentation.
- There were no reports for clinical data analysis; the team created a copy of the database in Azure Server to enable queries to meet the ad hoc reporting needs of the clinical team.

- The database copy synchronizes only a handful of selected tables, restricting teams from fetching necessary information for clinical data analysis.
- The team created copies of the production database on-demand, requiring extensive manual intervention and wait time for data availability.
- A mechanism to ensure no PII information was available in the reporting database was lacking.

The client needed a single window to view and manage customer interactions. It contacted Synoptek to build a robust CRM roadmap and enable the development of customized reports using Power BI.

## Approach and Solution

Synoptek provided a range of implementation, support, and consulting services for Dynamics CE implementation and Power BI integration.

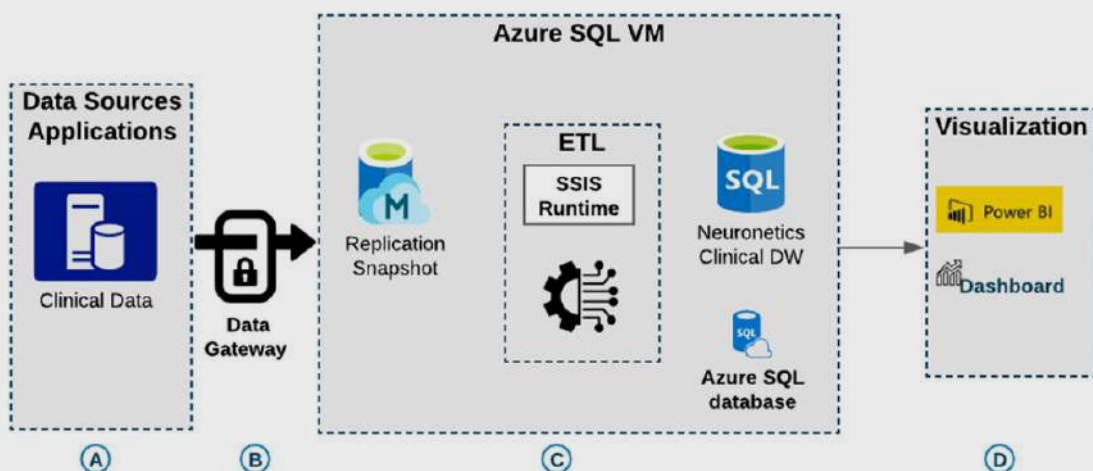
### Dynamics CE Implementation

A team comprising Dynamics 365 CE project manager/functional lead, Dynamics 365 CE technical onshore expert, and Dynamics 365 CE offshore technical expert carried out the following activities:

- Deployed Microsoft Dynamics CRM to enable rapid delivery and turnaround on ad-hoc enhancements and change requests and resolved the lead/marketing campaign data disconnect issue.
- Enabled two-way integration between NetSuite and Dynamics CE for improved clinical efficiency by streamlining workflows and ensuring real-time data access across departments.
- Implemented a Scorecard functionality and automated record generation, allowing in-form editing.
- Automated the 5-star rating process based on business-recommended field data, clearly indicating account progress.
- Enabled field-level security to restrict sensitive data to authorized users, like Leadership Meetings and Training.
- Automated the creation and distribution of unique PHQ-10 survey links and QR codes for each account, streamlining the survey process via CRM.
- Built a console app to ensure QR code attachments are added to emails while responses are collected, enhancing survey management and data tracking.

### Power BI Integration

Synoptek defined a reporting framework to enable users to access on-demand data and determine actionable insights.



We built out the infrastructure and architecture framework required for a data warehouse, sourcing data from different patient, treatment, and healthcare provider systems to meet the needs of stakeholders:

- Extracted data from the replication database in the Azure VM database using stored procedures and scheduled jobs and staged refreshed at a defined frequency periodically.
- Created a new SQL Database in Azure VM to store the data required for healthcare providers, patients, and treatment sessions.
- Deployed data source-wise ETL and defined functional data marts for sales, marketing, and clinical departments.
- Created reports across demographic and treatment criteria, trend analysis, etc.
- Supported current ETL jobs and failures, cleaned, standardized, and deduplicated data, and enabled continuous report enhancements.
- Resolved report and data issues faced by business users and redefined the Power BI ecosystem and security for enhanced user experience.



## Business Benefits

As a strategic partner, Synoptek has enabled the client's growth plans while addressing the data warehouse needs for several other business functions.

- Having a functional and stable CRM environment and new functionality within the application helps the client support numerous patients who rely on its devices.
- With our industry knowledge, we have provided direct ROI with time savings, removed knowledge barriers, and enabled several self-service solutions.
- Less time spent routing leads across various systems increases the conversion of leads.
- The clinical team has a centralized data model that makes it easy to collate data from various sources and make reports accurate and easy to build.
- The new data warehouse solution enhances clinical data quality, complies with required data privacy needs, and enables on-demand data and report access to stakeholders.
- The Score Card functionality streamlines the evaluation processes of the front office team member associated with the Account, significantly reducing manual effort and improving data accuracy.
- Field-level security enhances the efficiency and accuracy of tracking critical metrics across accounts.
- NetSuite CRM integration enabled better decision-making, enhanced patient care, and reduced operational bottlenecks.
- By laying the foundation for cross-functional reporting, the client can merge clinical data with sales data, and sales teams can now provide hyper-personalized care services with data harmonized in a single place.

## About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.