

# Salesforce (Health Cloud)

by Operations Director








Telehealth Platform

Patient CRM

## Details

Review Date	11/22/2023
Purchase Date	Q4'20
Implementation Time	N/A
Product Still in Use	Yes
Purchase Amount	per user per month
Intent to Renew	100%
Review Source	Elion

## Product Rating

Product Overall	 4.0
Use Case Fit	 5.0
Ease of Use	 4.0
API	 N/A
Integrations	 N/A
Support	 4.0
Value	 5.0

## About the Reviewer

User

## Reviewer Organization

Virtual-First Provider

Behavioral Health

## Reviewer Tech Stack

Tableau

Google Sheets

Snowflake

## Other Products Considered

N/A

## Summary

- **Product Usage:** The primary use case is tracking sales information, logging calls, meetings, and prospecting activities; Salesforce is also used for dashboarding and reporting, partnership management, admissions and intake process, verification of benefits, and post-treatment care.
- **Strengths:** Salesforce's strengths lie in its flexibility to handle various types of data and workflows, the ability to automate reporting, sending notifications and emails based on triggers, and its ability to integrate with numerous systems.
- **Weaknesses:** The product's weaknesses include limitations in visualization, dashboarding, and complex reporting, and a dated user interface; furthermore, too much flexibility can lead to a bloat with features and functionalities.
- **Overall Judgment:** Despite some drawbacks, Salesforce is a valuable tool for managing a wide range of processes within the company, from sales tracking to patient admissions and intake, making it a favorable choice.

## Review

### **Today, we're talking about Salesforce Health Cloud. Before we begin, could you give us a quick overview of your company and your role within it?**

Our company is a digital health provider. It's a full-service provider organization offering services for children and young adults. We engage with potential patients by building relationships with various healthcare providers, including hospitals, health systems, outpatient practices, and primary care physicians. Our outreach professionals are responsible for establishing these connections as part of our sales process.

### **What key business need drove the search for a product like Salesforce?**

The initial need was for a more robust solution to track sales information. It really started as a true sales CRM and evolved from there. As Salesforce's flexibility became apparent, we began to explore what other processes we could manage within it.

### **Which use cases does Salesforce support for your organization today?**

The primary use case is that Salesforce houses all of our sales information. This includes details for every potential account we target. We also pull additional information from data vendors to create richer account profiles. We store contact details; log calls, meetings, and prospecting activities; and track referrals from these organizations to monitor the performance of each account. That's a high-level overview of the sales use case.

We also use Salesforce for dashboarding and reporting, although it has many limitations. Often, we export data to tools like Tableau or Google Sheets to overcome these issues.

We form strategic partnerships with other organizations, and the whole partnership management process is managed in Salesforce. The process mirrors the sales approach but is more akin to an enterprise sales process and involves team members at the executive level.

Outside of sales, Salesforce is also used for our admissions and intake process. When a patient, family member, or referral source contacts us, our admissions team handles the intake process. They enter the relevant client information into Salesforce, tagging it to the relevant accounts and contacts that referred them. They use an integrated system to send all the necessary consents through Salesforce.

This includes storing all the documentation and notes related to their assessments within the platform.

Once the patient comes in, we use Salesforce as our system of record for storing information related to the verification of benefits. We use other systems to perform the verification itself, but the process runs through Salesforce, and the data is stored within it.

When a patient completes treatment, we use tools in Salesforce to help them find their next level of care. We leverage the platform and a built-in tool to establish that connection.

### **Do your clinicians also engage with Salesforce?**

Our intake team members are clinicians, but their role is focused on the pre-treatment phase. They use Salesforce for the intake process, and then the treatment itself is logged through our EHR system. Post-visit actions like discharge

and referrals are also handled in Salesforce, and at that stage, it's simply used to find the next level of care for our patients.

**What level of integration is there between Salesforce and other tools in your tech stack?**

We don't have a direct integration with Salesforce on the revenue cycle management (RCM) side. Our verification processes are conducted separately, and the information is manually entered. However, we do have a data lake called Snowflake, where we consolidate a lot of our Salesforce data—that allows us to build other tools and integrations. The integration approach has evolved over time. When we were smaller and less sophisticated, we would use off-the-shelf tools to create direct integrations between different systems. As we've grown, we've adopted a more thoughtful approach. Now, we export data from the original system into our data warehouse or data lake, and from there, we build our tools on top of it.

**How well does the Salesforce product work for your specific use cases?**

For admissions and intake, it works really well. Salesforce is exceptionally flexible in terms of the data it allows you to store and the workflows you can build. Even though Salesforce isn't built for these processes specifically, it's flexible enough to allow you to house various types of datasets and flexibly build tasks / task-based workflows on top.

A patient's journey is similar to a sales process, so you can enter a substantial amount of information about a patient and track their progress until they are admitted or not. We can also set up automated communications and notifications based on these stages. Overall, it's a smooth process.

**Can you provide an overview of the stakeholders who use Salesforce within your sales organization?**

Everyone in our sales organization uses Salesforce. We have an inside sales team that relies on Salesforce for their daily tasks. Our strategy operations team is the power user group; they're responsible for building the majority of the dashboards and reporting. The sales representatives themselves use Salesforce extensively. The team leaders, managers, VPs, and our partnerships team all use Salesforce. Basically, anyone who is involved with sales in our organization is a power user of Salesforce.

**Do your sales teams use the Salesforce mobile app when traveling?**

Yes, they do. In my experience, the mobile app is more suitable for quick data uploads, like uploading contacts or entering meeting notes on the go. However, when it comes to more in-depth reporting with larger visuals like charts and graphs, the app can be challenging. It's not as conducive to diving into insights and understanding data in detail. I view the mobile app as a tool primarily for on-the-go data entry rather than comprehensive business use.

**In terms of the specific use case of sales, what would you consider as the strengths and weaknesses of Salesforce?**

One of the biggest strengths is its ability to handle any type of data. It's built for this use case, and it offers great flexibility in terms of creating fields, automating reporting, and sending notifications and emails based on triggers. Salesforce comes with many built-in features and has sufficient flexibility to allow you to build what you need in addition to that.

The biggest downside in my experience is that there are limitations in terms of visualization, dashboarding, and reporting. You can build a lot of basic reporting in there—for instance, the sales team can see their sales dashboard in there—but building more complex reports is not always possible in Salesforce. Currently, our workaround involves

exporting our data to Google Sheets through an integration. We then build our more complex reports in Sheets, which allows us to achieve the level of flexibility we desire in terms of reporting and creating dashboards.

Many larger organizations use specialized business intelligence tools like Power BI or Tableau. We've now started using Tableau to enhance our reporting capabilities, but that means we're paying for two licenses. When we raised this with the sales team at Salesforce, they admitted that they don't do any of their own reporting in Salesforce—they use Tableau instead.

If you have a team of between five and fifteen sales reps, you can likely manage most of your needs within Salesforce. As your team grows, though, you'll have more data, and you'll want to analyze and visualize that data in different ways to gain deeper insights. It's difficult to do that next-level analysis in Salesforce itself.

**Are there any other strengths or weaknesses of the Salesforce product that you would like to highlight?**

The Salesforce user interface is fairly dated, but I don't think the aesthetics matter that much when you consider its business use case.

One important point to consider is that Salesforce's flexibility can lead to a lot of bloat. Teams may end up building a lot of features and functionalities in Salesforce, which can sometimes result in suboptimal implementation. That might lead you to hire an admin team to manage the building, which can create tension between those wanting to get things built quickly and those striving to build it the right way. It's a double-edged sword, as the flexibility enables a lot, but careful attention is required to ensure proper building practices.

**How did you solve that issue? Did you partner with or hire specific team members to optimize the setup? Or did you work with outside consultants?**

Initially, we worked with an outside consultant, but to be honest, they weren't great, so we decided to hire our own Salesforce admins. We now have multiple admins whose sole focus is on building, maintaining, and improving our Salesforce instance.

It's a business-critical application at this point, and it requires a lot of work in addition to setting up fields, workflows, notifications, and integrations. Every change we make now affects multiple teams simultaneously, so our admins have to manage stakeholders across seven or eight different teams to ensure that updates don't break anything for our users.

**Does the same team handle the creation of new dashboards and reports?**

No, most of the report and analysis creation is handled by our business and strategy teams. The Salesforce admins focus on managing the actual Salesforce infrastructure. We don't want our users in the field to create their own reports because they could potentially make mistakes or overlook filters that skew their results, so we confine that responsibility to our business and strategy teams.

**Have you encountered any reliability or stability issues with the Salesforce platform?**

No, not that I can remember.

**How extensively have you integrated Salesforce with other products, and how many of those are prebuilt integrations versus custom integrations?**

Because of Salesforce's size, most companies want to integrate with it. Most companies we've wanted to integrate with had built integrations with Salesforce. The challenge for us has been not whether an integration exists but rather how it works. Since we store so much mission critical data in Salesforce, we typically require a Business Associate Agreement (BAA) to mitigate any potential risks.

Typically, third-party vendors don't want to sign BAAs as it increases their liability. That's been a unique challenge for us due to our heavy reliance on Salesforce. Apart from that, I think most integrations work well; most companies have built solid integrations with Salesforce. For instance, there are good integrations available for inside sales platforms that facilitate automated outreach. Systems like ZoomInfo provide data pooled from various sources and offer integrations with Salesforce for a fee. So, most companies do have integrations, but the decision for us comes down to whether it makes sense to pursue them.

### **What is the account management and support like at Salesforce?**

The account management and support teams have been good; they're very knowledgeable. Salesforce has a wide range of products and modules, like Salesforce Maps and Tableau, that you may not have even considered. They're good salespeople, so when you build a relationship with a Salesforce account manager, they will try to identify other problems you may have and sell you additional solutions. They also check in regularly and will arrange dinners once you reach a certain size. They're not aggressive, but they proactively stay in touch. When we have questions about their products, they're very knowledgeable and helpful.

### **Have you discovered any new product suites or features through these conversations that you have decided to integrate into your instance or workflow?**

Typically, these would be things that we already knew existed and decided to implement when it made sense for us. So, it wasn't like these conversations brought something completely new to our attention.

### **Do you think your organization made the right decision in moving forward with Salesforce?**

Yes, definitely.

### **Are there any other general areas of growth that you would highlight for the Salesforce product?**

I believe data visualization and reporting are the main areas for growth, but to be honest, those things aren't likely to change, given that Salesforce already has Tableau in place.

### **Do you have any other general advice you would share with buyers in a similar position who are trying to maximize the benefits of a product like Salesforce?**

I think it's important to be thoughtful about your initial setup. Think about which teams will be using it and how they will be using it. Consider how different objects will work together. Being proactive in this planning stage can save you from having to rebuild things later on. While Salesforce offers great flexibility, that flexibility can be a double-edged sword. Being thoughtful upfront can help you avoid potential issues.

Another thing to consider is that Salesforce can be quite expensive. Be aggressive when you're negotiating, and leverage the promise of your future growth to bring down costs.