

Elos Medtech chooses Workbooks Cloud CRM to enhance global business operations

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Workbooks (<http://www.workbooks.com>), the cloud-based CRM and marketing automation vendor, announces Elos Medtech (<https://elosmedtech.com/>), a leading global medical device company, has chosen its platform to enhance communication between teams across the globe by capturing and sharing real-time information about customers across all touchpoints.

With its headquarters in Sweden, Elos Medtech is a growing, middle-market company with five production sites worldwide (US, China and Scandinavia). The core focus of the business is medical device manufacturing, specifically within the dental, orthopaedics and diversified life sciences markets. All the sites had been operating independently and manual processes were being used to document customer activities. However, it was becoming increasingly difficult to ensure all the dots were joined up when different sites were interacting with the same customer.

The corporate management team saw the need for a new IT strategy if they were going to remain competitive and move towards a market-centric focus. This prompted the search for a communication and business engagement tool to look at the business more globally and communicate with global market teams.

Jodie Gilmore, Managing Director at Elos Medtech in Memphis, said “The solution had to work for us and help us propel our systems. Choosing the right partner and finding a company that understood the way we worked was really key”. Four CRM vendors were evaluated but Jodie explained “early on our team had a good sense about Workbooks... the whole experience that Workbooks presented and the Shared Success Program really spoke to us. It made us feel confident that it would be a good process”.

Tim Turner, the project manager, explained, “As a growing, global medical device manufacturer with customers that are served by multiple divisions within our organization, we recognized the need for a “right-sized” CRM program that could meet our needs today and grow with us for years to come. Workbooks proved to be that “right-sized” solution with the capabilities of pulling data from multiple ERP systems and providing a platform for our teams world-wide to be able to work and share information. The Shared Success program further proved that Workbooks was willing to fully engage to ensure a successful launch”.

Further to Workbooks Shared Success Program, Jodie commented that “Workbooks did a great job of managing up to us. We needed that structure and discipline and people to push us – Workbooks did a really good job of laying out the steps of the process and when they needed to occur. Technically your teams really knew what they were doing”.

Workbooks approach as a partner really impressed the Elos Medtech team. Jodie continued, “because the Workbooks team was the integration team, you have a stake in the game of trying to make sure it works. And that it does what it needs to. What is driving your value in the proposition is the successful launching of the product with the customer”. During implementation Jodie shared that “the level of involvement and hands-on approach from Workbooks helped our team to make sure we had the right people in the room”.

Jodie also remarked on other IT projects the business was conducting in comparison to Workbooks: “Workbooks CRM has been significantly more positive, more beneficial, more collaborative and the only one to date that we have gone to full implementation with”.

Enabling the customer support team was the first priority for Elos Medtech, followed by project managers and then the sales, marketing and product quality control teams. The quickest win for the business is being able to understand global relationships and connections, specifically within the orthopaedics market, and being able to better leverage all of our customer touchpoints to further enhance these partnerships.

Jodie concluded by sharing her IT manager’s experience of Workbooks: “it’s rare to find people who are not only technically incredibly competent but also have a good process, and are really nice people to work with!”

About Workbooks

Workbooks offers growing companies a SaaS platform to run their business and engage effectively with their customers – at an affordable price. Its core CRM services extend beyond sales, marketing and customer services to include powerful marketing automation, event management, order management and fulfilment, invoicing and supplier management functionalities – at a price which is typically 50-70% less than alternatives such as Salesforce or Microsoft.

Workbooks unites the entire organization around data and processes, promoting teamwork and collaboration. It provides a single 360-degree view of customers and the information is accessible at all customer touchpoints. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the competition.

For more information, visit www.workbooks.com/us (<http://www.workbooks.com/us>)

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