



# INTUIT CUSTOMER SUCCESS STORY



## COMPANY

Intuit



## INDUSTRY

Healthcare



## OBJECTIVE

Reconfigure Salesforce to increase user adoption and improve reporting capabilities by removing duplicate records, creating custom dashboards, and customizing role hierarchy



## WHY

Intuit Health had more than 2.5 million patients and 32,000 providers using their patient portal and they needed an automated tool to quickly pull data to measure sales and marketing KPI's to allow them the insights to make data-driven business decisions.

## TECHNOLOGIES & SERVICES USED



StarrData's Salesforce Implementation

## CUSTOMER QUOTE

“StarrData is easy to work with, responsive, and they keep their promises. The changes they've made to Salesforce have given us better insight into our sales processes and sales forecast. They've also increased user adoption by making Salesforce easier and more relevant for our users.”

- Jeffrey Mayone, Sales Manager

## BEFORE

Intuit Health was facing low user adoption of Salesforce, which was leading to inadequate reporting capabilities on both sales and marketing fronts. As a result, they lacked critical insights on lead conversion, ROI for specific campaigns, and the cost of acquisition per client. Without proper reporting, sales managers were spending too much time manually gathering data to measure sales KPIs.

## AFTER

StarrData Identified and deleted over 100,000 duplicate records that immediately simplified the user interface and also implemented checks to prevent future duplication. They also closed all stale opportunities and performed tests to prevent future opportunities from going stale.

A role hierarchy was implemented to limit the visibility of specific records and thereby create more security within the system. Standardized sales dashboards were created by StarrData so that management and end-users could easily track weekly and monthly stats while comparing current results with goals.

Lastly, StarrData sifted through and verified correct lead sources and campaign association of web leads so that campaign effectiveness could be easily monitored.



## RESULTS

- Increased user adoption due to the simplification of the user interface and functionalities
- Drastically improved user satisfaction and retention from improving security and implementation of best practices
- Added the ability to compare performance and measure the ROI of sales and marketing campaigns
- Complete visibility into the full sales pipeline, KPIs, and lead conversion
- Provided new insights that support more effective and efficient business practices and campaigns