

# PreventionGenetics Increases User Adoption with Salesforce and Ledgeview Partners



PreventionGenetics Sees Increased Efficiencies with Mobile CRM Usage, Leading to Balanced Collaboration



Lack of compatibility with CRM Integrations forced PreventionGenetics to reevaluate their current solution. Users were becoming frustrated and PreventionGenetics was losing CRM user adoption.

Rachel Reed, Marketing Manager at PreventionGenetics, says the team needed a new CRM solution that would enable their day-to-day processes to become more efficient.

As the company's CRM Administrative Lead, Reed was in charge of the evaluation process for implementing a new CRM Solution. She says deciding on Salesforce was a fairly easy choice because it offered the marketing automation and email integrations they were looking for.

From a quick Google Search, Reed realized the partnership between Google and Salesforce would enable the seamless integrations the company was looking for and resolve ongoing issues.

This in mind, she reached out to Ledgeview, who she had become familiar with through her own professional network. Reed knew Ledgeview offered Salesforce implementation and support, and saw moving to Salesforce with the firm as another quick win.

Though the PreventionGenetics team's use of CRM is limited to their sales and marketing departments now, they hope to explore the possibilities of using it in other departments in the future. The focus with sales and marketing fits their business model best today. In the future, they anticipate growing their usership.

With their old CRM Solution, Reed says only about 20, to 40% of Users were adopting the system, but now PreventionGenetics is closer to 80%.



The solution was an easy fix for PreventionGenetics and Ledgeview. Ledgeview's prior knowledge of PreventionGenetics' industry helped set the tone for a successful Salesforce implementation project.

"I was the biggest advocate for the switch, encouraging the ease of use for end users, and the Salesforce product really came through," Reed says.

The accessibility of Ledgeview's staff, assets, and support were major benefits PreventionGenetics saw in working together on this transformative project. In addition to adopting a new CRM system, PreventionGenetics' sales team needed a more efficient way to enter information and access it while in the field.

They found the solution to this problem in Salesforce Mobile CRM, which now allows PreventionGenetics' sales team to enter information from their meetings while it is still fresh in their minds.

PreventionGenetics' sales and marketing teams were eager to see how the integration would help ease their workflows. As a result of transitioning to Salesforce, not only did user adoption increase but also so did the collaboration between team members as day-to-day processes became more efficient.

“Utilization has significantly increased since we implemented Salesforce. And having that increased utilization is going to help us with our future sales and marketing efforts and make them more efficient. We’re really picking up the pace with Salesforce.”

- Rachel Reed, Marketing Manager at PreventionGenetics

## THE BENEFITS

Ledgeview’s project with PreventionGenetics provided the seamless Gmail integration they were looking for in Salesforce. In addition to meeting the company’s technical demands, Ledgeview provided excellent support when questions or updates came up during the transition.

“The communication was great, regular updates were provided, and questions were answered quickly via email,” Reed says. “Overall, my experience working with Ledgeview has been really great.”

PreventionGenetics also uses Pardot in Salesforce for marketing automation to make their business procedure even smoother.

PreventionGenetics aspires to use Salesforce more and more. With the ease of use that the company now sees in their CRM system, Reed is confident that introducing Salesforce to more internal staff in the future will be a breeze.

“It’s really great to show them how easy Salesforce is for what we do,” Reed says.

As far as how Salesforce is changing the way their business runs, Reed is excited to see how using Salesforce email tracking with clients positively affects other aspects of their business long-term. Short-term, Reed has seen quick benefits. Communication with their customers has already become more effective and organized.

The future is bright for PreventionGenetics, what with a sturdy CRM user base they plan to grow, increased organizational mobile efficiencies, and balanced collaboration between their marketing and sales team.

As their business and Salesforce evolve, PreventionGenetics excites over the possibilities of advanced data collection and customer outreach.

## ABOUT THE COMPANY

PREVENTION GENETICS



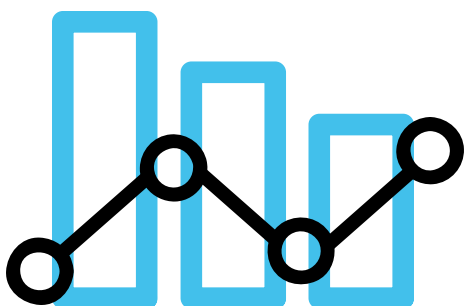
Founded in 2004 and located in Marshfield, Wisconsin, PreventionGenetics is a CLIA and ISO 15189:2012 accredited clinical DNA testing laboratory. PreventionGenetics provides patients with sequencing and deletion/duplication tests for nearly all clinically relevant genes. Tests include PreventionGenetics’ own powerful and comprehensive whole exome sequencing test, PGxome™. PreventionGenetics operates primarily business-to-business with diagnosis testing as their focus.

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Ledgeview Partners' consultants combine savvy business intellect with strong technological aptitude to provide solutions that extend well beyond software implementations. It's about building relationships, transforming business, and delivering phenomenal customer experiences.

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