

Salesforce in Healthcare: The 30,000ft Architectural Guide.



Introduction

For those in the Healthcare & Life Sciences industry, the transition into Salesforce requires informed decisions to quickly maximize the ROI on your investment.

There are many millions of pages of content on the web from Salesforce themselves and it's sprawling ecosystem, so it can be daunting to begin the process of decoding the information into bite-sized snapshots to inform the buying process..

This guide is written by consultants at the coal face of Salesforce in H&LS, and aims to give you a concise overview of the best practices from the work already undertaken in the market.

Contents:

- Best Fit Salesforce Products
- Demand Generation Tools
- Sales & Marketing Flow
- Patient Management Tools
- Patient Experience Flow
- Integration
- ETL vs API Integration
- Finance
- Analytics
- Quick Wins vs Complex Projects

Best Fit Products

Salesforce now offers a sparkling array of products, but that can make it difficult to get a high-level view of what's useful for your organization.

Let's take a quick look at which products are most commonly used in the Healthcare Industry, before going into more depth on the subsequent pages.



Demand Generation

Salesforce boasts a strong suite of tools across Sales & Marketing. Typically, Healthcare firms that use Sales Cloud eventually take advantage of maps and quote-to-cash functionality to supercharge sales productivity.

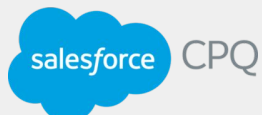
Sales can also be fed with MQLs from within the same platform via the broad spectrum of products now known as Marketing Cloud.



The entry level product for most, Sales Cloud is an engine to nurture leads, manage accounts and develop sales opportunities.



A Maps overlay on Sales Cloud is a great fit for the geography-based 'patch' of a typical pharma or medical devices rep.



Complex quoting, document generation & contracting / amendment / renewal processes from within Sales Cloud.



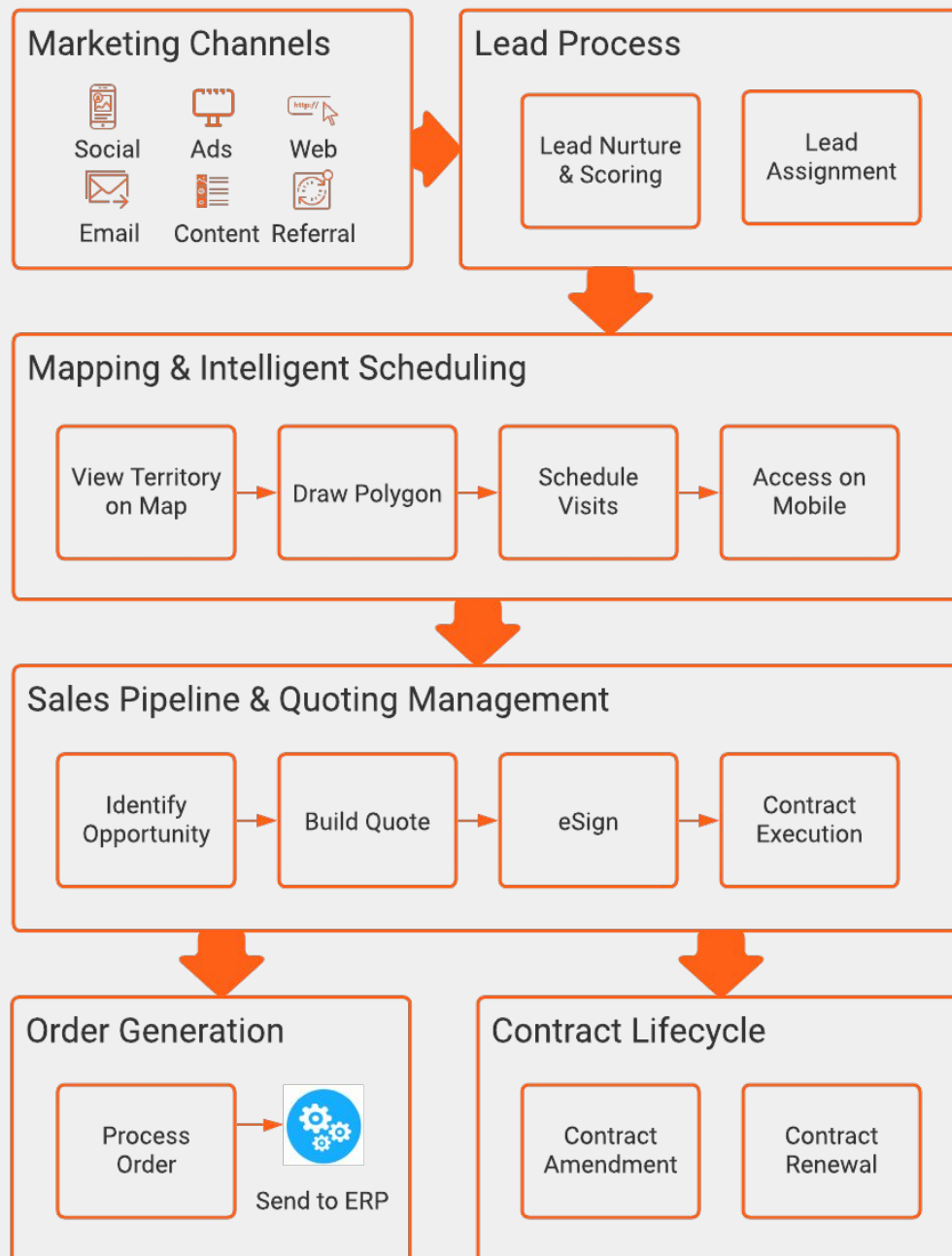
Customer-driven ordering processes in B2B Commerce, including the complexities of managing the sale of controlled substances.



Multi-channel marketing execution with an array of tools across email, web, social and event management.

Typical Data Flow - Sales & Marketing

From lead generation through to contract lifecycle management, a typical Pharma / Medical Devices organization can benefit from transitioning the following processes into the Salesforce platform where it will be relatively easy to evolve in the future.



Patient Care & Operations

Pure Healthcare Providers (HCPs) tend to start their Salesforce journey from the service end, focussing on improving the patient experience. And Salesforce comes with a rich suite of pre-built functionality to facilitate that - normally 90% of the implementation is point-and-click.



Service Cloud tracks customer interactions from various channels from capture through to closure. Sometimes in a healthcare context it's used instead of Health Cloud.



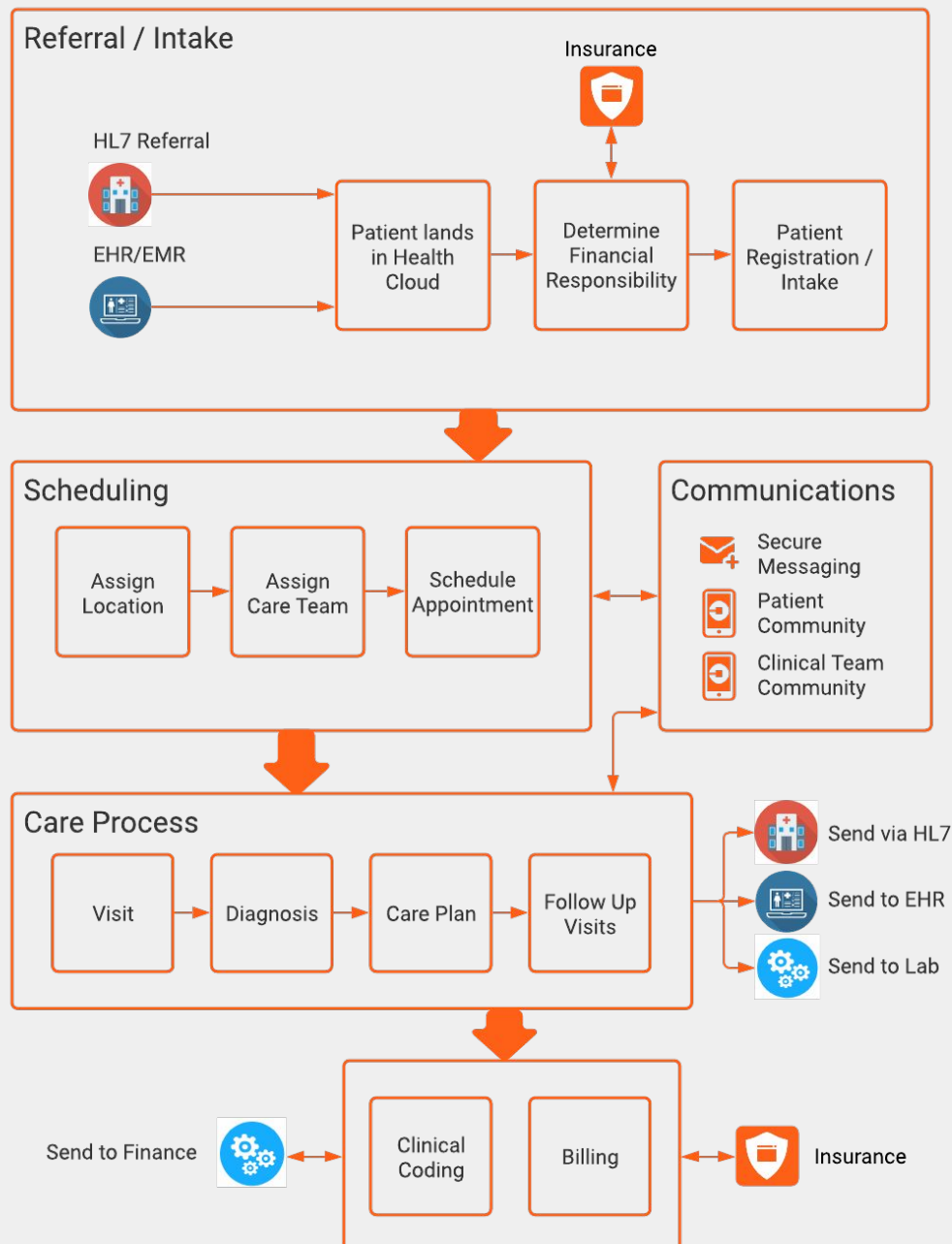
Health Cloud is an overlay to Service Cloud which provides a care-focussed UI alongside base level objects to support common Healthcare integrations such as HL7 and EHR.



Communities can be utilized to collaborate on data and workflows in various contexts - Patients, Clinical Teams, Labs, even suppliers and partners.

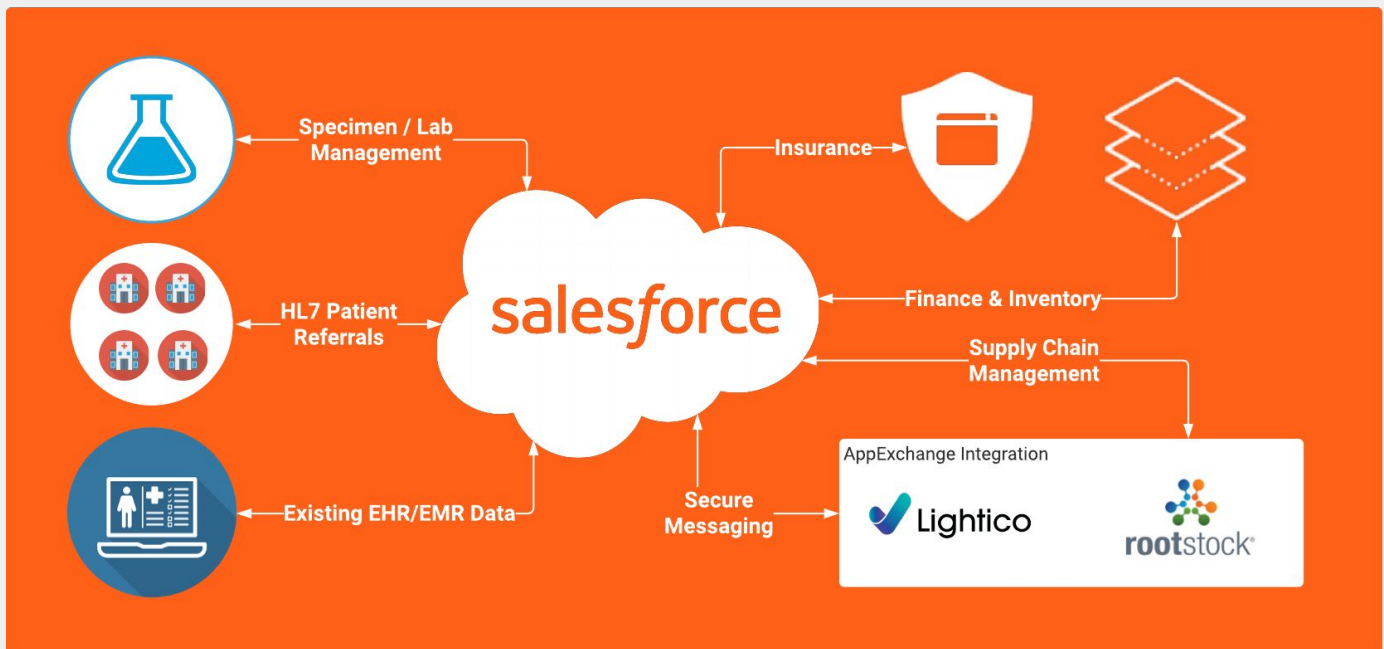
Typical Data Flow - Patient Experience

In managing patients, data normally arrives from HL7 and/or EHR before being processed in Health Cloud. Intake, intelligent scheduling, care planning and secure communications are often the key planks of the implementation.



Integration

Whether HCP, Pharma or Medical Devices, the typical Salesforce environment is normally heavily integrated in order to allow complete processes with little or no manual transfer.



While Salesforce becomes the central point of information flow, there are still external systems that handle processes such as lab testing, Insurance, HIPAA-compliant communications, finance, inventory and supply chain management.

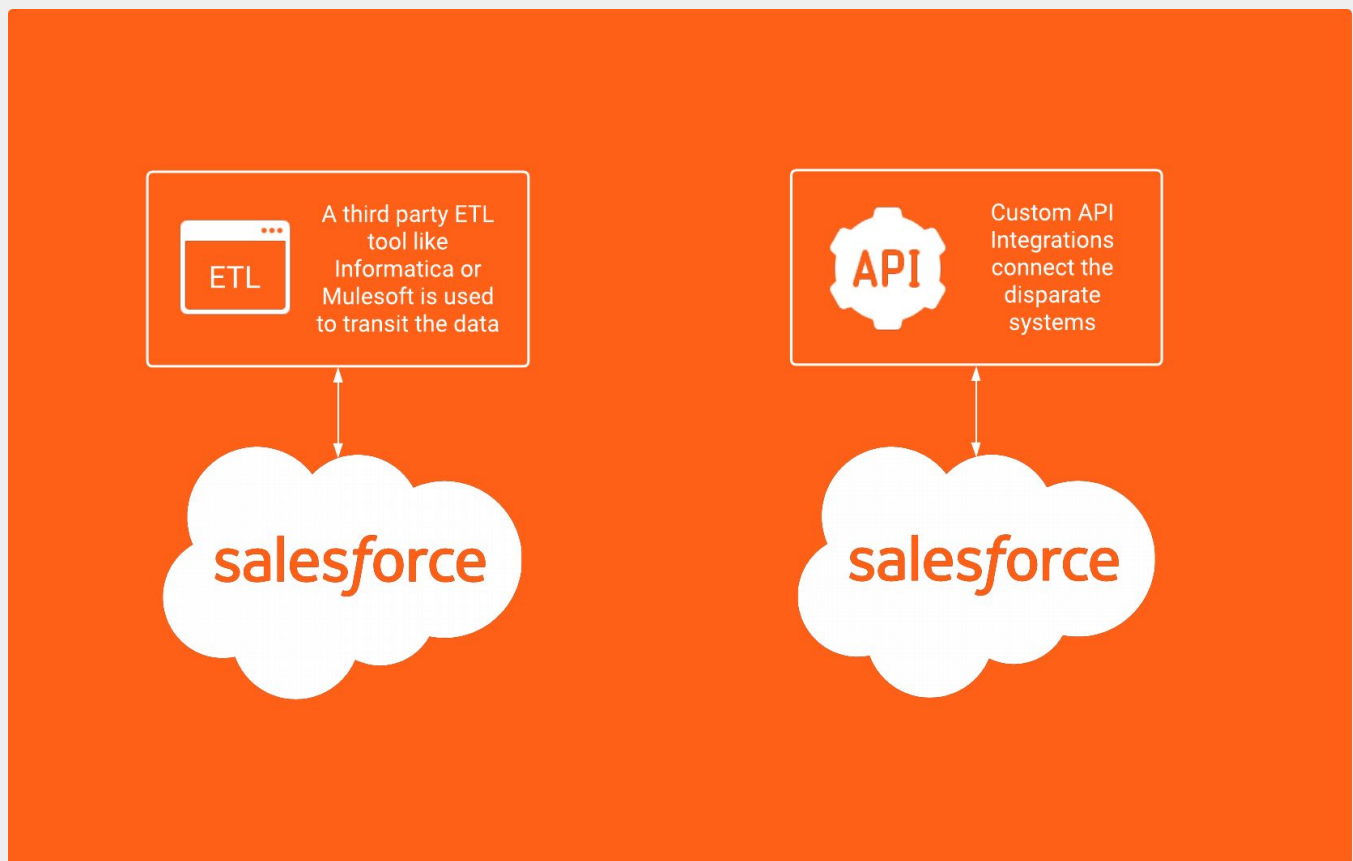
Connectivity is a key focus of most Healthcare industry Salesforce implementations and interoperability of data between systems is a large part of what defines a great customer experience.

It's crucial to get the data flowing properly now so competitive advantages can be gained by accessing AI and IoT as they emerge in the coming few years.

Custom Integration or ETL?

Deciding whether to use a custom (API) integration or an ETL is often driven by circumstance. If an existing ETL like Informatica or Mulesoft is already in place, then most prefer to utilize that.

If you're planning to release multiple integrations straight off the bat then an ETL might be a good idea. If you're starting with just one or two integrations and prefer to develop custom than pay licensing for an ETL, then the API might be the answer.



Another consideration is how the patient data flow works - if you are already tied to a specific HL7 or EHR interface, then the methods of connecting to that interface could dictate the next steps according to the path of least resistance.

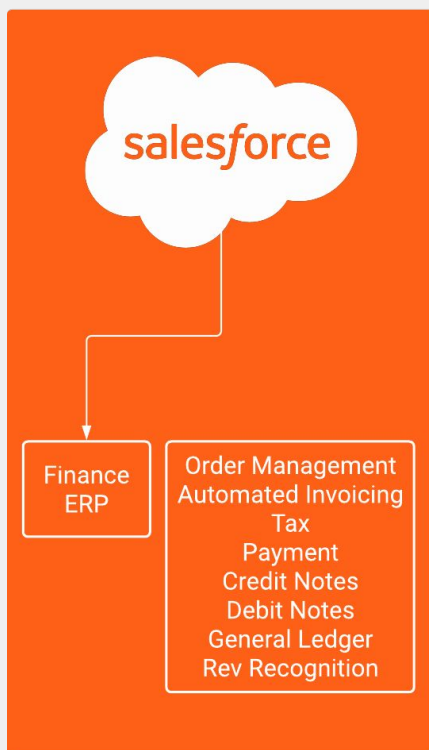
Finance

Integration to finance systems is a uniform objective across the industry, but at what point that integration kicks in will vary depending on the customer. If Salesforce Billing is used, this allows for a later integration to the finance system for Revenue Recognition & GL.



Salesforce Billing allows for Invoicing and other finance-related functionality from within the Salesforce Platform.

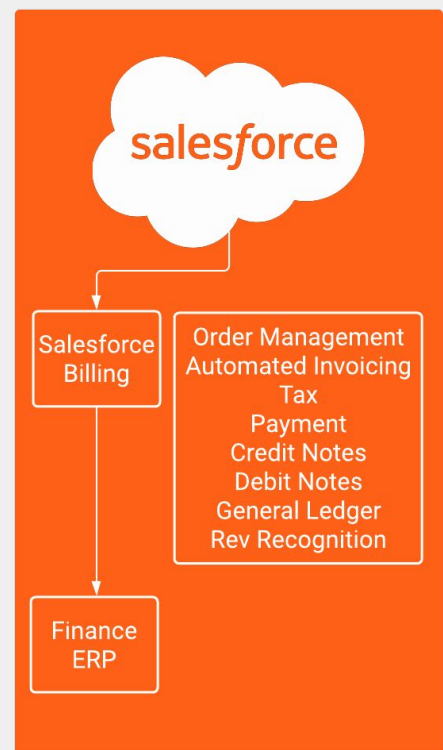
ERP-Driven Finance



Blended



Salesforce-Driven Finance



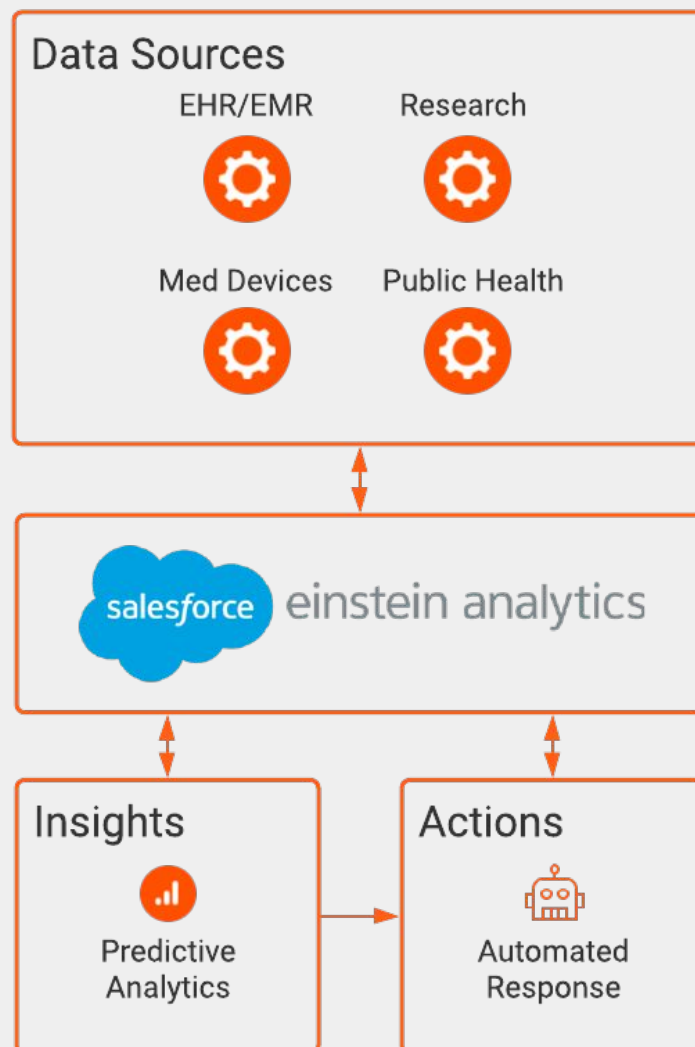
Analytics

Salesforce reporting is linear and dependent on object relationships, which is great for traditional information such as Sales, Marketing & Operational performance. But these days many larger organizations want to combine sources to gain the full depth of insights into their business.



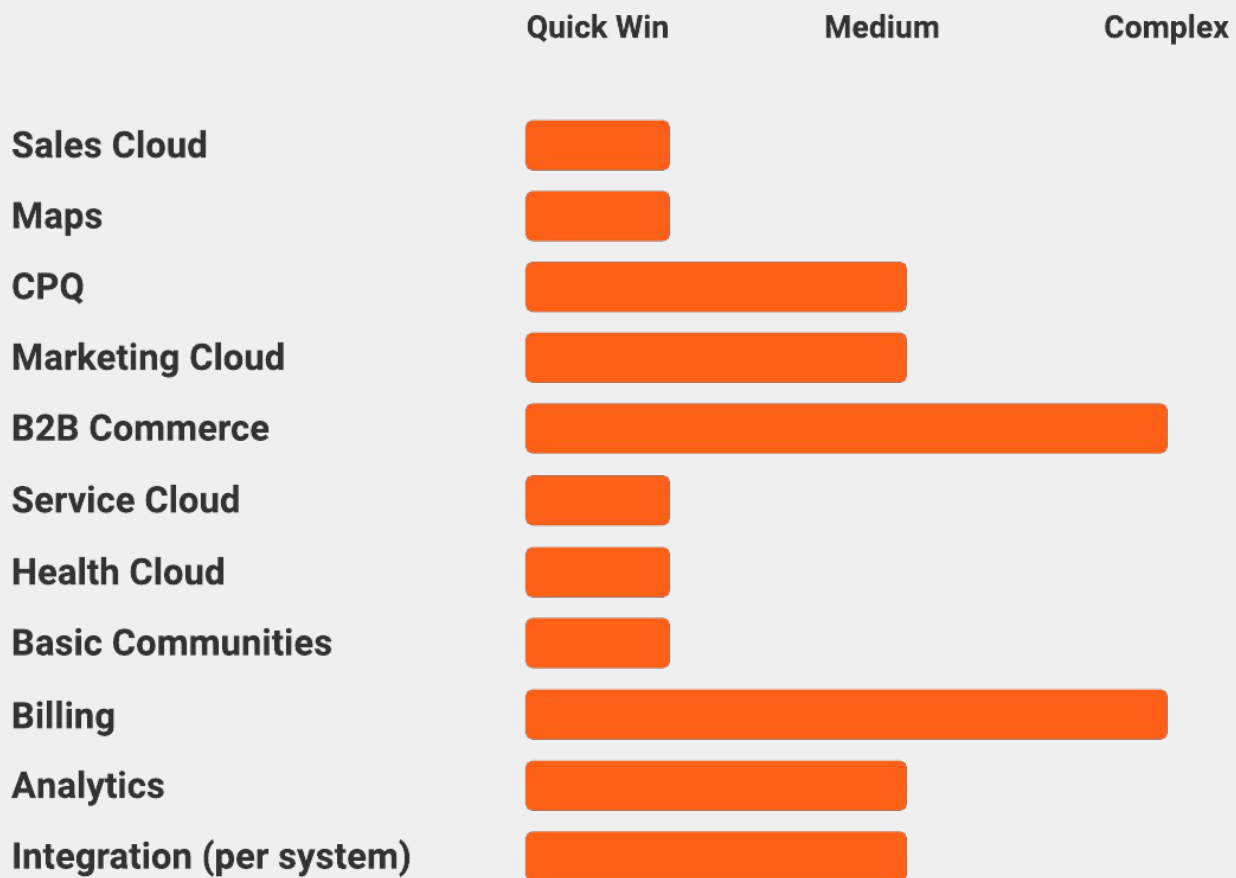
einstein analytics

Advanced analytics and powerful BI, with Einstein AI providing the predictive intelligence aspect.



Assessing Complexity

Coming into the Salesforce world, it's always best to think of it as a journey. Most firms start with the Sales or Service process and build out over a number of years into other areas of the business. For the products we've covered in this guide, we've compiled a handy reference guide to show you where the quick wins are, and what will require more intensive effort.



Brick Lane Factsheet

Brick Lane is a multi-cloud Salesforce partner with an expert-level understanding of the Healthcare & Life Sciences industry.

>12 Yrs

In the Salesforce space

50+

Sales Cloud Projects

20+

CPQ & Billing Projects

>5 Yrs

Healthcare & Life Sciences Experience

20+

Service Cloud Projects

40+

Operational Projects

Leadership Team



Starting as a Salesforce Administrator, Aidan went on to a Salesforce consulting career spanning over 10 years and 5 continents before Co-Founding Brick Lane in 2018. A senior-level Solution Architect, his areas of Salesforce expertise include Health Cloud, Sales Cloud, CPQ, Service Cloud, Workforce Planning, and eCommerce.



Robert started his journey in technology over 20 years ago working for Siebel in California. Since then, he has experienced life as a consultant, project manager, program manager and now as a Co-Founder at Brick Lane. Robert's areas of expertise are around Integration, Project Management, Finance, Sales & eCommerce.