



Conceptus[®]

Incorporated

Overview

Country or Region: United States

Industry: Healthcare

Customer Profile

Conceptus, founded in 1992, develops and markets medical products for women's health. A small, growing company with fewer than 200 employees, Conceptus achieved U.S.\$11.6 million in sales in 2004.

Business Situation

Conceptus needed a customer relationship management (CRM) system that integrated with its business management software to help the company sell its flagship product and track physician training.

Solution

Conceptus deployed Microsoft[®] CRM, Microsoft CRM Mobile, and third-party software to provide a widely accessible CRM system that integrates with its business management software.

Benefits

- Provides complete, accurate customer data
- Reduces data gathering and reporting from days to hours
- Boosts doctor certifications by tenfold in first 90 days
- Increases productivity with mobile access

Medical Products Maker Taps Opportunities with Complete, Accurate Customer Data

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Jeff Letasse, Senior Director of IT, Conceptus

In late 2002, Conceptus, a California-based medical products company, received approval from the U.S. Food and Drug Administration (FDA) to market its Essure product in the United States. Anticipating rapid growth, the company needed to improve its efficiency and streamline the tracking of physician training on the product. In 2003, Conceptus began deploying Microsoft[®] CRM (now part of Microsoft Dynamics[™]), third-party software from the ISS Group and Axonom, and Microsoft CRM Mobile to create a customer relationship management (CRM) system that integrated with its QAD business management software. By 2005, office and mobile employees had access to a wealth of customer data, increasing efficiency and productivity. The company has reduced the time spent gathering and reporting data from days to hours, while dramatically increasing the number of doctors certified to use its product.



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Situation

Conceptus is a California-based company that develops and markets medical products for women's health. In 2004, the company posted sales of U.S.\$11.6 million.

The company had been in business 10 years when, in November 2002, the U.S. Food and Drug Administration (FDA) authorized its flagship Essure product for sale in the United States. Previously, Conceptus had marketed this woman's health product only in Canada, Australia, and several European countries.

With a large potential market in the United States, Conceptus needed to put a sales and marketing infrastructure in place to handle its anticipated growth. Like many growing companies, Conceptus wanted to increase its efficiency by integrating sales and marketing data with its accounting and other business management software from QAD. Conceptus used QAD for accounting and inventory management, as well as for processing orders and invoices. With its existing system, service representatives and sales people at Conceptus could not easily view customer data that was outside of their respective areas of contact. And data had to be entered more than once. For example, customer information that resided in the QAD software had to be re-entered into personal contact lists or into a training database created in-house using FileMaker software.

Conceptus not only wanted an easier way to track physician training, it also needed a more sophisticated tracking mechanism to assure compliance with FDA requirements. And the company wanted its tracking system to help determine the effect of its training program on sales. For example, Conceptus wanted to know how many doctors initiated orders after they were trained.

Determining which physicians ordered the product was complicated because doctors do

not order the product directly. The hospital or clinic where the doctor practices actually places the order. But Conceptus hoped a new system would capture enough data to make it easier to evaluate the relationship between training and sales, in spite of this limitation. Such a system could also help the company improve its ability to follow up on doctors who had registered for the training or had started but not completed it. The training was required for every physician who wanted to use the product, and, with effective follow-up, the company hoped to get more doctors certified and ultimately boost its sales.

Company executives decided to look for customer relationship management (CRM) software that it could integrate with its QAD software to provide the data and tracking mechanism that it needed. Because the company reaches doctors through a direct sales force—as well as through its Web site, trade shows, direct-mail, and telemarketing campaigns—the company needed a CRM system that could support mobile workers, too. "Our field sales staff spend days traveling and hours waiting in doctors' offices to see physicians," says Jeff Letasse, Senior Director of IT, Conceptus. "Because they are frequently out of contact with the office for long periods of time, the information they have is not always up-to-date. We thought an integrated CRM system that included our mobile workers would make a difference."

Solution

The executives at Conceptus began their search for an integrated CRM system in early 2003, as sales began to rise with the opening of the U.S. market. The management looked at products from Siebel and ACT! before deciding on Microsoft® CRM.

"We chose Microsoft CRM for several reasons," says Letasse. "The Siebel solution was expensive, and the other products did

not provide the features we needed. Microsoft CRM could also be easily integrated with our existing Microsoft infrastructure. We would not have to hire a whole new set of technicians.”

Conceptus already relied on Microsoft Windows Server System™ integrated server software—including Microsoft Exchange 2000 Server for its e-mail communications server, and Microsoft SQL Server™ for data warehousing—to store and organize its business data. By choosing Microsoft CRM software, the company could also integrate the Microsoft Office Outlook® 2003 messaging and collaboration client, and with mobile support, it could provide access to all users, both inside and outside of the office. “The ability to integrate Microsoft CRM with Microsoft Outlook and provide Web, PDA, and graphical user interfaces played a significant role in our decision,” says Letasse.

With the assistance of the ISS Group, a Microsoft Certified Partner and independent software vendor (ISV), Conceptus is phasing in its new solution, which began in mid-2003 and is continuing through 2005. The ISV, which specializes in CRM implementations for manufacturing, deployed Microsoft CRM 1.0 and its own software, the iBridge connector.

The iBridge connector software provides two-way data transfers between Microsoft CRM and the Conceptus QAD business management software. The ISS Group also deployed a training certification software module from Axonom, a Microsoft Gold Certified Partner, to track physician training. The physician Web site was integrated with the Microsoft CRM system, enabling Conceptus to capture the data from the physicians’ online registrations. Throughout, the ISS Group used tools from the Microsoft CRM Software Development Kit to complete the integration.

The ISS Group trained the IT staff at Conceptus, so they were able to take over the later phases of the deployment, which continues to roll out. Conceptus upgraded to Microsoft CRM 1.2 in mid-2004. The company also deployed the Microsoft CRM Mobile 1.2 for its salespeople, who use personal digital assistants (PDAs). The operating system for the PDAs is the Microsoft Windows Mobile™ 2003 software for Pocket PCs.

Although Conceptus experienced some initial difficulties with the PDA devices due to confusion over technical requirements, the problems were quickly resolved with help that the ISS Group received from Microsoft. “This experience is a good example of how customers can benefit from a strong partner relationship,” says Bob Ferraro, Vice President of Sales, ISS Group. “Microsoft brought in its developers and others to help.”

The implementation, which Conceptus is continuing, has been a phased rollout, with the number of users ranging from 50 in the first phase to an expected 150 users by the end of 2006. “One of the reasons this implementation has been a success is that Conceptus added to its Microsoft solution in stages,” says Ferraro. “We got things working in one area before we went to another. The best advice I’d give to other companies considering CRM is to roll it out as Conceptus did, with a well planned, phased approach.”

Benefits

Integrating Microsoft CRM with its QAD software gave Conceptus several advantages, including reducing duplicate data entry, improving customer service, and enhancing its tracking of training and leads. Perhaps most importantly, Conceptus employees have better customer data to work with—even employees working in the field. Based on its

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early success, Conceptus anticipates further advances as it moves forward.

Provides Complete, Accurate Customer Data

Now, with an integrated CRM and business management system, sales representatives and executives get a complete view of their physician customers with accurate, up-to-date information. Staff need only to enter data once—either into the QAD software or Microsoft CRM—to automatically populate the corresponding fields in the other software. Users can view a comprehensive record of physician contacts with the company, as well as the status of their training. As a result, customer questions are answered quickly, and the doctors are better served.

The tracking of U.S. physician training has improved significantly. When a physician completes the Web orientation, that information is electronically recorded and reported. Field trainers can electronically submit data on-site by using their PDAs, so the training process is monitored every step of the way. These initial automations are streamlining efforts and shortening work cycles. What used to take up to several weeks of faxing and data entry now takes hours, providing improved data accuracy and quicker reporting.

What's more, Conceptus now has the data to make correlations between training and orders of Essure. Although it is still not possible to identify which doctor is responsible for an order, Conceptus can now analyze relationships between the number of doctors who are trained at a facility and the number of orders the company has received. This ability will help Conceptus refine its training process.

Conceptus expects to benefit more from its improved data in the future. The company can use the Microsoft CRM software to track

the effectiveness of its various sales channels—including Web, direct-sales, direct-mail and marketing campaigns—or even to evaluate the success of different types of offers as it moves forward.

Boosts Doctor Certifications by Tenfold in First Three Months

The improved ability to track U.S. physician training gives Conceptus a powerful tool to increase physician certification on Essure—and ultimately increase sales—while it builds stronger customer relationships. The company recently initiated an outbound calling program to follow up with doctors who have registered or taken one or more classes without completing the rest of the training. "We now have a whole set of untapped business leads that we can now go after proactively," says Letasse. Even in the initial stages, Conceptus is making progress. "By following leads aggressively in the first three months, we got 30 to 40 percent of the doctors through the process and certified to use the product, compared to 3 or 4 percent in the past."

Increases Productivity with Mobile Access

Microsoft CRM has also increased the productivity of the company's mobile workers. Field trainers and sales representatives can now view and enter data related to accounts, contacts, opportunities, and activities even when they are not connected to a network. Data on doctor training or sales contacts can be entered into the PDA while the employees are in the field. Then, when they access the corporate network, the data on their PDAs is synchronized with the rest of the data on the system. "Our field people have more options with Microsoft CRM for Mobile," says Letasse. "They can choose to travel without laptops, and they no longer have to call the office and wait for someone to look up information."

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about ISS Group products and services, call (973) 812-9700 or visit the Web site at: www.issgroup.net

For more information about Conceptus products and services, call (877) 377-8732 or visit the Web site at: www.conceptus.com

Enables Low-Cost System Maintenance

Conceptus also appreciates the system's ease of maintenance. "Unlike some solutions that we considered, we can maintain Microsoft CRM with our existing IT staff of four," says Letasse. "Because it fits easily into our Microsoft environment, we're also confident that we can deploy upgrades at a reasonable cost and effort."

Offers New Possibilities

Later in 2005, Conceptus will make its physician Web site a full-fledged Web portal. Today, the site provides only Web registration and general information. The new portal will authenticate the doctors according to their status with the company. After registering, the doctors will be able to maintain their own contact information and class schedules, attend self-paced training/orientation sessions, and view specialized program information. Ordering facilities will also be able to order literature and product online and check order status.

Executives at the company are continuing to explore new ways to use the system. "We're just beginning to discover the potential of Microsoft CRM," says Letasse. "It's operating the way we want it to, and we're seeing results. Adopting Microsoft CRM is a strategic move that will continue to pay off for us as we find new ways to tap the data."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics



Software and Services

- Microsoft Dynamics
 - Microsoft CRM
 - Microsoft CRM Mobile
- Microsoft Office System
 - Microsoft Office Outlook 2003
- Microsoft Windows Server System
 - Microsoft Exchange 2000 Server
 - Microsoft SQL Server 2005 Standard Edition

- Microsoft Windows Mobile 2003 software for Pocket PCs

Partners

- ISS Group

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Document published June 2005

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