

CASE STUDY

salesforce

Life Sciences cloud implementation for a MedTech company

Discover how we partnered with an innovative medical device manufacturer to build a future-ready CRM ecosystem tailored for life sciences.

Challenge

A rapidly expanding medical device company was outgrowing its internally developed CRM, which supported 80 field representatives. To support continued growth, the organization required expert evaluation of CRM and data solutions. They faced a complex decision-making process with numerous CRM and data platforms available in the market, each offering varying features, scalability, and industry fit. With no internal precedent for large-scale CRM evaluation, the company needed guidance to navigate a crowded vendor landscape and identify a solution that aligned with both its operational needs and long-term commercial strategy.



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Solution

We conducted a comprehensive CRM solution assessment aligned to the client’s business needs, pricing considerations, scalability goals, and long-term value—and led the vendor selection process to a successful outcome.



Modernized commercial processes for managing accounts, contacts, opportunities, transactions, and field activities to boost operational efficiency



Designed and implemented Salesforce Life Sciences cloud with NetSuite Integration via CData Connect Cloud, ensuring seamless transaction flow



Executed phased national rollout with stakeholder alignment, user training, system testing, and change management to drive adoption and performance

Key Results

We enhanced cross-functional visibility across sales and service teams, enabling better coordination, faster response times, and more informed decision-making.

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Increased operational efficiency by streamlining workflows and reducing manual processes, freeing up resources to focus on high-value activities

Established a unified CRM platform as the single source of truth for sales data and activity tracking

Implemented CData Connect Cloud integration to NetSuite for seamless transaction flow into the CRM platform, ensuring data consistency and real-time visibility