



Medical Device Case Study with Formstack and Docs

Medical Device Company in Charlottesville, VA

"They are very professional and really spend time understanding the issues and providing quality solutions."

- December 17, 2020
via AppExchange Verified Review

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WE CAN HELP.**

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THE SITUATION:

The Client needed to optimize their Salesforce instance and increase adoption rates of the technology across a National Sales Team. The Client was open to change, and was looking for a consultative influence to help them enable best practices.

THE PROBLEM:

An audit of their systems revealed an inefficient process for lead generation, lack of timely responses to the new leads by the sales team, and the need for executive management to have clearer visibility into the sales funnel.

THE SOLUTION:

Carabiner Group implemented Formstack Forms as a timely and efficient solution.

This would allow leads from the website and trade shows to flow directly into a territory assignment and lead-cultivation framework. The automated solution enabled a frictionless workflow and near-immediate action on the inbound leads.

Simultaneously, Carabiner Group instituted Formstack Documents to automatically generate quotes, contracts, and invoices from Salesforce. This coupled with a series of alerts and triggers relating to inactivity on leads enabled Sales reps to stay engaged.

To address the last issue, a series of list views, reports, and dashboards were built for regional managers to oversee their team's performances throughout the quarter.

THE OUTCOME:

Carabiner Group continues to lead ongoing development in addition to serving as remote administrators supporting the National Sales Team's efforts.

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