



Virtuosity
Consulting

IMPACT STORIES

HEALTHCARE REIMAGINED AND DELIVERED WITH VIRTUOSITY

THE SITUATION

Vera Whole Health is transforming healthcare beyond treating symptoms. Their mission is to build a health revolution through coaching and education while re-thinking how healthcare is administered using a radically different revenue model: a per month, per-person membership fee. To do this, Vera needed a partner to define a strategy in delivering value-based customer care and simplifying a very complex process with advanced customer relationship management (CRM) technology, as well as a method to create a scalable customer experience for both clients and clinics.

VIRTUOSITY ENGAGES

Vera chose Virtuosity based on their credentials and reference ability across the salesforce ecosystem as a preferred supplier. Vera also appreciated Virtuosity's passion and buy-in to their mission and cause.

The Virtuosity team mapped the entire customer lifecycle and vetted CRM platforms, and based on requirements and detailed analysis, Salesforce was selected to achieve Vera's goals. Virtuosity worked closely with each department head and key stakeholders to design, implement, and develop a test sandbox environment. Following that, they built out very detailed processes and criteria to weigh Vera's opportunities and client service touchpoints, and then configured Salesforce to work with the desired process seamlessly. Virtuosity took a proactive lead on establishing, testing, and maintaining specific integrations with Salesforce, like DocuSign contract process, which were not initially part of the engagement, but were extremely helpful in saving them hours of processing time.

Once thoroughly tested, the data and configurations were migrated from the sandbox environment into the production Salesforce. Training was developed and delivered by Virtuosity to the Vera teams to help them understand, align, and follow the processes. The Vera teams were thrilled to learn that it made their lives easier and more productive by expediting their decision making and engagement process.

ACHIEVING FULL POTENTIAL

With Virtuosity's help, Vera now uses intelligent technology and processes to maximize efficiency while delivering exceptional experiences across all verticals. By attracting patients and offering improved services and on-going engagement, Vera is now delivering more efficiently and effectively on their mission. With real-time dashboards and KPIs to measure the productivity of sales and customer service departments against established baselines, Vera continues to scale rapidly. The initial results are profound: Vera was able to survey their clients and noted both an improved overall client satisfaction rate and retention by 30%, and hours' worth of saved employee productivity.



STANDARDIZED
ONBOARDING



IMPROVED CLIENT
SATISFACTION BY 30%



USE OF KPIs
& DASHBOARDS



SALESFORCE
INTEGRATIONS

ONGOING PARTNERSHIP

Vera continues to engage Virtuosity's resource capabilities on specific projects surrounding further iterations of their CRM and other client experience initiatives.

CLIENT

Vera Whole Health

SCOPE

Salesforce Development,
Integration, and Support



VIRTUOSITY

HAS BECOME AN INTEGRAL PART
OF OUR GROWTH STRATEGY

and we rely on them heavily to help us enable our sales and service success as we continue to grow at record pace. We count on them for ongoing strategy and execution of all of our critical workflow processes and help us automate them and integrate them into Salesforce where possible.

- Jennifer Sargent, CRO -



vera
WHOLE HEALTH

