Contents

Healthcare Sales Reference Guide

Salesforce Healthcare Conference - Process Mining, Task Mining & Org Analysis

Target Audience: Payers, Providers, Pharma, MedTech, Life Sciences

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Executive Summary: Market Opportunity

The Transformation Market Gap

- **95% of transformation initiatives fail** - not because technology doesn't work, but because companies fly blind
- Traditional process mining tools ($100K-500K deployments) exclude 99% of businesses
- Management consulting ($2M+ engagements) only accessible to large enterprises
- **150,000+ SMBs and mid-market companies** locked out of modern transformation tools

EVOLVE Market Sizing

Total Addressable Market (TAM): - **Salesforce ecosystem**: 150,000+ customers, $16.6B annual spend (Service + Sales Cloud) - **Customer service automation**: $5-10B opportunity targeting 2.1M workers - **Process intelligence**: $23B market by 2030 (33% CAGR)

Serviceable Addressable Market (SAM): - **73,500 Salesforce SMB customers** (49% of install base) - **133,500 SMB + mid-market Salesforce customers** (89% of install base) - Healthcare verticals well-represented in Salesforce customer base

Per-Agent Economics (Simple Heuristic): | Metric | Value | |———|——-| | **EVOLVE pricing** | $350-400/agent/month | | **Annual per agent** | $4,200-4,800/year | | **Value created** | $26,000-32,500/agent/year (40-50% automation) | | **Customer ROI** | 544% per agent | | **Payback period** | 1.9 months |

Example: 10-Agent Healthcare Customer Service Team - Annual EVOLVE investment: $45,000 - Annual labor savings: $290,000 (45% automation of $645K fully-loaded cost) - Net annual benefit: $245,000 - ROI: 544%

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1. Market Primer: Process Mining

What It Is

- Technology that analyzes event logs from business systems to visualize how processes actually work

- Creates process maps and flowcharts automatically from system data
- Reveals bottlenecks, variations, and inefficiencies in real workflows
- Provides data-driven insights into process performance vs. designed processes
- Shows the "as-is" reality rather than theoretical process documentation

Value Proposition

- **Visibility**: Discover how work actually happens across systems and teams
- **Efficiency**: Identify bottlenecks, redundancies, and waste in processes
- **Compliance**: Detect process deviations and regulatory violations automatically
- **Optimization**: Prioritize improvement initiatives based on data, not assumptions
- **ROI Quantification**: Measure time, cost, and resource impact of process inefficiencies
- **Continuous Monitoring**: Track process performance over time, not just point-in-time snapshots

History and Growth Rates

- **Origins**: Emerged from data mining research in early 2000s (Netherlands)
- **Market emergence**: 2010s - early vendors like Celonis, UiPath Process Mining (formerly ProcessGold)
- **Current market size**: $23B projected by 2030
- **Growth rate**: 33% CAGR (MarketsandMarkets 2024)
- **Maturity stage**: Rapidly growing from early adoption to mainstream enterprise acceptance
- **Driver**: Digital transformation accelerated by COVID-19 and AI/automation initiatives
- **Enterprise adoption**: 8,000 large enterprises currently using process mining

Key Players

- **Celonis** - Market leader, $13B valuation, enterprise-focused
- **UiPath Process Mining** - Part of $12B RPA platform, integrated automation approach
- **SAP Signavio** - Acquired by SAP, integrated with ERP systems
- **IBM Process Mining** - Enterprise integration focus
- **Apromore** - Recently acquired by Salesforce (2024)
- **Microsoft Power Automate Process Advisor** - Low-code platform integration
- **Smaller specialists**: Software AG (ARIS), QPR, Everflow, PAFnow

Key Capabilities

- **Event log extraction**: Pull data from ERP, CRM, databases, applications
- **Process discovery**: Automatic visualization of actual process flows
- **Conformance checking**: Compare actual vs. intended processes
- **Performance analysis**: Identify cycle times, wait times, handoff delays
- **Bottleneck detection**: Pinpoint where work gets stuck or slowed
- **Variant analysis**: See all the different ways a process is executed
- **Root cause analysis**: Understand why deviations and delays occur
- **Simulation**: Model "what-if" scenarios for process improvements
- **Dashboards and reporting**: Executive views of process health

Key Challenges

- **Enterprise pricing**: $100K-500K per deployment, excludes SMB market entirely
- **Data integration complexity**: Requires extensive system access and data preparation
- **Insight-to-action gap**: Shows problems but doesn't execute solutions
- **Static analysis**: Point-in-time snapshots that become outdated quickly
- **No peer benchmarking**: Each company analyzes in isolation, no competitive intelligence
- **Implementation time**: 6-12 months for large enterprise deployments
- **Siloed intelligence**: No cross-company learning or aggregate insights
- **Limited to transactional systems**: Misses desktop/human workflow activities

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2. Market Primer: Task Mining

What It Is

- Desktop activity monitoring and analysis technology
- Captures user interactions with applications, screens, and data
- Uses screen recording, keystrokes, mouse movements, and application events
- Observes human workflows that don't leave traces in system event logs
- Complements process mining by capturing the "last mile" of work

Value Proposition

- **Desktop visibility**: See what employees actually do hour-by-hour
- **Hidden work discovery**: Capture manual workarounds, spreadsheet work, email processes
- **Automation opportunity identification**: Find repetitive tasks suitable for RPA or AI agents
- **Time allocation analysis**: Understand where employee time actually goes
- **Training needs identification**: Spot inefficient workflows and knowledge gaps
- **Productivity optimization**: Quantify time spent on low-value activities
- **Pre-automation assessment**: Validate process stability before automating

History and Growth Rates

- **Origins**: Evolved from desktop analytics and user activity monitoring (mid-2010s)
- **Market acceleration**: 2018-2020 as RPA vendors sought better opportunity identification
- **Included in process mining market**: Often bundled in $23B process mining TAM
- **Standalone market estimates**: $2-3B subset of broader process intelligence category
- **Growth rate**: 35-40% CAGR, faster than traditional process mining
- **Driver**: RPA failures created demand for better pre-automation discovery

Key Players

- **Soroco** - Pure-play task mining leader
- **Kryon** - Full-cycle automation platform
- **UiPath Task Mining** - Integrated with RPA platform
- **Microsoft Power Automate** - Desktop flow recording
- **Celonis Task Mining** - Added to process mining platform

- **Automation Anywhere** - Discovery Bot for automation opportunity identification
- **Blue Prism** - Process intelligence capabilities
- **ABBYY Timeline** - Task and process mining combination

Key Capabilities

- **Screen recording and capture**: Visual records of user actions
- **Application usage tracking**: Time spent in each system
- **Keystroke and click analysis**: Repetitive action detection
- **Desktop workflow mapping**: Sequence of activities across applications
- **Manual task identification**: Spot copy-paste, data entry, validation activities
- **Process variant detection**: See how different users approach same task
- **Automation opportunity scoring**: ROI calculation for potential bots
- **Time and motion analytics**: Detailed productivity measurement

Key Challenges

- **Privacy and security concerns**: Desktop monitoring raises employee trust issues
- **Cloud-based architectures**: Sensitive data uploaded to vendor servers
- **Expensive specialized sensors**: Proprietary monitoring software required
- **Employee resistance**: Perception of "Big Brother" surveillance
- **Data volume management**: Hours of screen recordings create storage challenges
- **Limited to observed users**: Sampling bias if not deployed broadly
- **No aggregate intelligence**: Each deployment is isolated, no cross-company learning
- **Implementation friction**: Requires desktop software installation and IT approvals

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3. Market Primer: Salesforce Org Analysis

What It Is

- Assessment and optimization of Salesforce platform configuration and usage
- Analysis of customizations, integrations, workflows, and user adoption
- Health check of Salesforce instance architecture and technical debt
- Evaluation of business process implementation within Salesforce
- Identification of optimization opportunities and best practices alignment

Value Proposition

- **Optimization**: Identify underutilized features and wasted licenses
- **Technical debt reduction**: Find duplicate fields, unused automation, overcustomization
- **Performance improvement**: Detect configuration issues slowing the system
- **User adoption insights**: See which features users actually use vs. ignore
- **Cost reduction**: Right-size licenses, eliminate redundant apps, optimize storage
- **Best practices alignment**: Compare configuration against Salesforce recommendations
- **Migration readiness**: Assess preparedness for new Salesforce releases or features
- **ROI maximization**: Ensure Salesforce investment delivers full value

History and Growth Rates

- **Origins**: Emerged as Salesforce ecosystem matured (2015+)
- **Market drivers**: Rising Salesforce costs, complex implementations, underutilization
- **Market size**: Part of broader Salesforce services market ($40B+ annually)
- **Org analysis subset**: $3-5B estimate (consulting, managed services, optimization tools)
- **Growth rate**: 20-25% CAGR, tied to Salesforce platform growth
- **Salesforce installed base**:
  - **150,000+ customers globally**
  - **Service Cloud**: $9.05B revenue (FY2025), 1.2-1.5M agents
  - **Sales Cloud**: $7.58B revenue (FY2025)
  - **SMB dominance**: 49% are SMBs (<50 employees) = 73,500 companies
  - **Mid-market + SMB**: 89% of customers (133,500 companies)
- **Healthcare opportunity**: Significant Salesforce Health Cloud adoption in payers/providers
- **Optimization gap**: Most SMBs lack resources for proper org optimization

Key Players

- **Salesforce Professional Services** - First-party optimization services
- **System integrators**: Accenture, Deloitte, PwC, Capgemini (Salesforce practices)
- **Specialized consultancies**: Cloud Sherpas, Simplus, Coastal Cloud, Traction on Demand
- **AppExchange tools**: Salesforce Optimizer (native), OwnBackup, Gearset, Copado
- **Metadata analysis platforms**:
  - **Hubbl** - Salesforce org analysis and documentation automation platform
  - **Elements.Cloud** - Salesforce metadata comparison and deployment tool
  - **Metazoa** - Salesforce metadata management and quality analysis
- **Managed service providers**: Coastal Cloud, Silverline, VRP Consulting
- **Independent consultants**: Thousands of Salesforce-certified individual practitioners
- **Emerging category**: Process mining vendors targeting Salesforce (Apromore acquisition by Salesforce 2024)

Key Capabilities

- **Configuration audit**: Review custom objects, fields, workflows, validation rules
- **Security assessment**: Profile, permission set, sharing rule analysis
- **Code review**: Apex, Visualforce, Lightning component quality checks
- **Integration mapping**: Identify all inbound/outbound connections and APIs
- **Data quality analysis**: Duplicate detection, data completeness, field usage
- **Adoption dashboards**: Login frequency, feature usage, license utilization
- **Performance optimization**: API limits, governor limits, query efficiency
- **License optimization**: Identify unused or underutilized licenses
- **Automation review**: Process Builder, Flow, Workflow Rule effectiveness

Key Challenges

- **Consulting-heavy model**: Requires expensive manual analysis by certified experts
- **Snapshot assessment**: Point-in-time analysis, not continuous monitoring
- **No peer benchmarking**: Customers don't know how their org compares to similar companies
- **Limited to configuration**: Misses actual user behavior and process execution

- **Reactive not proactive**: Assessments done when problems arise, not preventatively
- **Expensive for SMBs**: Optimization services priced for mid-market and enterprise only
- **Implementation dependency**: Recommendations require follow-on consulting to execute
- **Siloed view**: Salesforce-only perspective, doesn't show cross-system processes

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4. Healthcare-Specific Considerations

Payer (Health Insurance) Organizations

Process Mining Applications

- **Claims processing optimization**: Identify bottlenecks in adjudication workflows
- **Prior authorization workflows**: Reduce cycle times and manual reviews
- **Member enrollment processing**: Streamline onboarding and eligibility verification
- **Provider network credentialing**: Accelerate provider enrollment and re-credentialing
- **Appeals and grievances**: Ensure compliance with regulatory timelines
- **Care management workflows**: Optimize case assignment and care coordinator activities
- **Compliance monitoring**: Detect process deviations from CMS regulations
- **Fraud detection workflows**: Identify patterns in claims review processes

Task Mining Applications

- **Claims adjudication desktop work**: Capture manual claim review and research activities
- **Provider call center operations**: Understand rep workflows across multiple systems
- **Member services operations**: Identify repetitive tasks in customer service workflows
- **Medical coding and billing**: Find manual lookup and data entry inefficiencies
- **Utilization review**: Capture clinical reviewer desktop workflows
- **Benefits administration**: Identify manual processes in plan configuration

Salesforce Org Analysis Applications

- **Service Cloud for provider relations**: Optimize provider inquiry and dispute processes
- **Member case management**: Improve member services and complaint resolution tracking
- **Broker and agent management**: Optimize sales pipeline and commission workflows
- **Marketing Cloud for member engagement**: Analyze campaign effectiveness and personalization
- **Community Cloud for provider portals**: Assess adoption and self-service effectiveness
- **Health Cloud**: Analyze care coordination and member 360 configurations

Key Healthcare Considerations

- **HIPAA compliance**: PHI protection in all monitoring and analysis
- **Regulatory reporting**: CMS, state DOI requirements for timely processing
- **Star Ratings impact**: Process efficiency directly affects quality measures
- **Provider satisfaction**: Network adequacy depends on fast credentialing and payment
- **Medical Loss Ratio (MLR)**: Administrative cost efficiency affects profitability
- **Member retention**: Service quality and claim processing speed drive satisfaction

Provider (Hospitals, Health Systems, Medical Groups)

Process Mining Applications

- **Patient scheduling and registration**: Reduce wait times and no-show rates
- **Revenue cycle management**: Optimize charge capture, coding, billing, collections
- **Clinical documentation workflows**: Ensure complete and timely EHR documentation
- **Referral management**: Track referral loops from PCP to specialist to PCP
- **Supply chain and inventory**: Optimize clinical supply ordering and usage
- **Bed management and patient flow**: Reduce ED wait times, improve throughput
- **Quality reporting workflows**: Streamline abstraction and submission processes
- **Care coordination**: Track patient handoffs between care settings

Task Mining Applications

- **Physician EHR usage**: Identify documentation burden and inefficient workflows
- **Nurse charting activities**: Reduce time spent on administrative tasks
- **Registration desk operations**: Capture manual data entry and verification steps
- **Coding and CDI workflows**: Find opportunities for automation in HCC coding
- **Prior authorization work**: Quantify staff time spent on payer authorizations
- **Medication reconciliation**: Identify manual steps in pharmacy workflows

Salesforce Org Analysis Applications

- **Health Cloud**: Patient relationship management and care plan optimization
- **Service Cloud for patient services**: Optimize scheduling, billing inquiries, support
- **Marketing Cloud for patient engagement**: Analyze appointment reminders, preventive care campaigns
- **Community Cloud for patient portals**: Assess portal adoption and digital engagement
- **Salesforce for revenue cycle**: Optimize collections workflows and payment plans
- **Provider referral management**: CRM for physician relations and referral tracking

Key Healthcare Considerations

- **Physician burnout reduction**: Minimize EHR clicks and administrative burden
- **Regulatory compliance**: Joint Commission, CMS CoPs, meaningful use requirements
- **Quality measures**: HEDIS, Core Measures, value-based payment programs
- **Patient safety**: Process deviations can have clinical consequences
- **Revenue optimization**: Capture charge accuracy, clean claim rates, denial management
- **Staffing efficiency**: Optimize FTE allocation amid nursing shortages
- **Patient experience**: HCAHPS scores, satisfaction, and loyalty

MedTech (Medical Device & Technology)

Process Mining Applications

- **Order-to-cash workflows**: Optimize quote, order, fulfillment, invoicing cycles
- **Field service operations**: Track device installation, maintenance, repair workflows
- **Regulatory submission processes**: FDA 510(k), PMA, international approvals
- **Sales operations**: Opportunity to contract workflows, VAR management
- **Clinical trial support**: Study setup, patient enrollment, data collection processes

- **Quality management**: CAPA, complaint handling, audit response workflows
- **Supply chain and logistics**: Optimize inventory, distribution, returns processes
- **Customer support operations**: Technical support and troubleshooting workflows

Task Mining Applications

- **Sales rep administrative work**: CRM data entry, expense reports, scheduling
- **Field service technician activities**: Documentation, parts ordering, follow-up
- **Regulatory affairs documentation**: Manual document preparation and submission
- **Customer support desktop workflows**: Research, troubleshooting, escalation processes
- **Clinical specialist activities**: Supporting surgeon usage, training documentation
- **Quote and proposal generation**: Manual processes in complex deal configuration

Salesforce Org Analysis Applications

- **Sales Cloud for device sales**: Optimize opportunity management and pipeline forecasting
- **Service Cloud for field service**: Track device installations, preventive maintenance, repairs
- **Partner Community for distributors**: Optimize VAR/distributor portal engagement
- **CPQ (Configure Price Quote)**: Optimize complex product and pricing workflows
- **Marketing Cloud for HCP engagement**: Analyze surgeon and clinician outreach
- **Einstein Analytics**: Optimize sales forecasting and territory management

Key Healthcare Considerations

- **FDA compliance**: QMS requirements for process documentation and change control
- **Sales rep efficiency**: Complex products require significant education and support time
- **Clinical evidence generation**: Real-world evidence and outcomes data collection
- **ASC/hospital credentialing**: Time to get devices approved for use in facilities
- **Reimbursement support**: Help customers navigate payer coverage and coding
- **Product adoption**: Training and support required for successful clinical usage
- **Post-market surveillance**: Track device performance and adverse events

Life Sciences (Pharma & Biotech)

Process Mining Applications

- **Clinical trial processes**: Patient screening, enrollment, site monitoring, data collection
- **Drug development workflows**: From discovery through preclinical to clinical phases
- **Regulatory submission**: IND, NDA, BLA preparation and approval tracking
- **Medical affairs processes**: Medical information requests, scientific engagement
- **Pharmacovigilance**: Adverse event reporting, signal detection, ICSR workflows
- **Commercial operations**: Sample management, speaker programs, congress support
- **Medical science liaison activities**: HCP engagement tracking and insights
- **Manufacturing and quality**: Batch release, deviation management, validation workflows

Task Mining Applications

- **Clinical research associate work**: Site monitoring documentation and reporting
- **Medical writer activities**: Protocol, CSR, regulatory document preparation
- **Safety case processing**: Individual case safety report preparation

- **Commercial operations tasks**: Sample ordering, event logistics, expense processing
- **Medical information specialist work**: Literature search, response preparation
- **Regulatory affairs documentation**: Manual processes in submission preparation

Salesforce Org Analysis Applications

- **Veeva CRM (Salesforce-based)**: Optimize sales rep call planning and HCP engagement
- **Service Cloud for medical information**: Track HCP inquiries and response times
- **Marketing Cloud for HCP engagement**: Optimize multi-channel marketing campaigns
- **Community Cloud for patient support**: Patient assistance programs, hub services
- **Salesforce for clinical trial management**: Site selection, patient recruitment tracking
- **Partner Community for contract research**: CRO and vendor management

Key Healthcare Considerations

- **FDA/EMA compliance**: 21 CFR Part 11, GxP requirements for electronic records
- **Patient safety**: Pharmacovigilance speed and accuracy are critical
- **Clinical trial efficiency**: Enrollment rates and cycle times affect market entry
- **HCP engagement regulations**: Sunshine Act, FCPA, anti-kickback compliance
- **Commercial effectiveness**: Rep productivity amid access restrictions
- **Medical affairs value**: Scientific exchange and evidence generation
- **R&D productivity**: Reduce cycle times from discovery to approval
- **Patient access**: Support programs, reimbursement support, adherence initiatives

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5. Synaptic Differentiation

How Is Our Process Mining Unique?

Edge-First Architecture

- **Privacy-preserving**: Data stays local, never uploaded to cloud servers
- **Security by design**: Eliminates cloud-based data breach risks
- **No integration complexity**: Observes workflows without system access requirements
- **SMB-accessible pricing**: Freemium model vs. $100K-500K enterprise deployments
- **Instant deployment**: Desktop app vs. 6-12 month implementation cycles

Aggregate Intelligence & Peer Benchmarking

- **Cross-company learning**: Your insights improve from other users' anonymized data
- **Competitive intelligence**: See exactly how you compare to similar organizations
- **Best-practice identification**: Learn from successful transformations at peer companies
- **Industry-specific benchmarks**: Healthcare-focused comparison data
- **Real-world patterns**: Not consulting theory, but actual observed workflows

End-to-End Transformation Platform

- **Not just discovery**: Includes design, delivery, and continuous management
- **Actionable insights**: From process maps to deployed AI agents
- **Continuous improvement**: Ongoing monitoring and optimization, not one-time assessment

- **Closes the execution gap**: Mining vendors show problems, we execute solutions

Healthcare-Specific Value

- **HIPAA-compliant by design**: Edge architecture solves PHI concerns
- **Salesforce Health Cloud expertise**: Deep integration with healthcare platforms
- **Clinical workflow understanding**: Purpose-built for healthcare operations
- **Regulatory awareness**: Built-in compliance monitoring capabilities
- **Payer and provider focus**: Optimized for healthcare-specific processes

ROI Advantage

- **SMB-accessible pricing**: $350-400/agent/month vs. $100K-500K enterprise tools
- **Fast time-to-value**: Free discovery phase builds trust before commitment
- **Quantified savings**: 40-50% automation potential = $26K-32K value/agent/year
- **Customer ROI**: 544% ROI per agent with 1.9-month payback period
- **Network effects**: Platform gets smarter with every user, improving recommendations
- **Complete lifecycle**: MINE (free) → DESIGN → DELIVER → MANAGE phases

How Is Our Task Mining Unique?

Zero-Trust Desktop Monitoring

- **Local LLM inference**: AI runs on device, not cloud
- **Selective capture**: Users control what's monitored and shared
- **Privacy-first design**: Sensitive screens automatically excluded
- **No surveillance perception**: Positioned as personal productivity tool
- **Employee empowerment**: Workers see their own insights first

Commodity Technology Approach

- **Standard LLMs**: No specialized monitoring sensors required
- **Vision AI**: Screen understanding through commodity computer vision
- **Lower costs**: 70-80% cheaper than specialized task mining tools
- **Rapid deployment**: Install desktop app vs. complex monitoring infrastructure
- **Universal compatibility**: Works across all applications and systems

Integration with Process Mining

- **Unified platform**: Desktop activity + system event logs in single view
- **Complete process visibility**: "Last mile" human work plus system workflows
- **Seamless experience**: One tool for discovery, not separate process and task mining
- **Aggregate learning**: Desktop patterns contribute to peer intelligence

Healthcare-Specific Value

- **Physician burnout focus**: Quantify documentation burden and identify relief opportunities
- **Clinical workflow optimization**: Understand actual caregiver desktop activities
- **Administrative waste reduction**: Find manual workarounds and inefficiencies
- **Training and onboarding**: Identify best practices from high-performing users

- **Compliance verification**: Ensure required workflows are followed

How Is Our Org Analysis Unique?

Continuous Monitoring vs. Point-in-Time

- **Real-time assessment**: Always-on monitoring, not periodic audits
- **Drift detection**: Alert when configuration or usage deviates from optimal
- **Proactive optimization**: Identify issues before they impact users
- **Trend analysis**: Track adoption and performance over time
- **Automated reporting**: Stakeholder dashboards without consultant engagements

Behavior + Configuration Analysis

- **Usage patterns**: Not just what's configured, but what's actually used
- **Adoption insights**: Feature utilization by role, team, and individual
- **Process execution**: See how business processes run within Salesforce
- **Cross-system view**: Salesforce in context of overall workflow ecosystem
- **ROI measurement**: Quantify actual value delivered by Salesforce investment

Peer Benchmarking for Salesforce

- **Compare to similar orgs**: How does your configuration stack up against peers?
- **Industry best practices**: Healthcare-specific Salesforce optimization patterns
- **Feature adoption rates**: Are you ahead or behind in utilizing new capabilities?
- **License optimization**: Right-sizing based on actual usage patterns
- **Cost efficiency**: Compare Salesforce spend to peers with similar needs

Healthcare-Specific Value

- **Health Cloud optimization**: Purpose-built for healthcare use cases
- **Service Cloud for healthcare**: Patient services and provider relations workflows
- **Regulatory compliance**: Configuration aligned with HIPAA, FDA requirements
- **Integration assessment**: APIs and connections to EHR, practice management systems
- **Patient engagement**: Portal adoption, self-service effectiveness, digital health tools

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6. Probing Prospect Questions

Process Mining Questions

Discovery & Pain Points

- What percentage of your staff time is spent on manual, repetitive tasks?
- Do you know which of your business processes have the most variation and why?
- How long does it currently take you to map out a process when considering automation?
- How do you currently identify which processes to automate or improve?
- What tools or methods do you use today to understand how work actually flows through your organization?
- When was the last time you had a comprehensive process assessment? How much did it cost?

Current State Assessment

- Do you have visibility into process bottlenecks across your systems?
- Can you quantify the cost of process inefficiencies (time, FTEs, errors)?
- How do you know if your processes are being followed as designed?
- Do you have a way to benchmark your processes against industry peers?
- How quickly can you detect when a process is deviating from standards?

Automation & Transformation Goals

- What are your top 3 process improvement or automation priorities this year?
- What's preventing you from moving faster on automation initiatives?
- Have you attempted RPA or AI agent deployments? What were the results?
- How do you prioritize which processes to transform first?
- What would it be worth to reduce cycle times in [critical process] by 30-50%?

Healthcare-Specific

- How are you addressing physician/clinician documentation burden?
- What's your strategy for improving [Star Ratings / HEDIS / quality measures]?
- How do you ensure regulatory compliance in your key workflows?
- What percentage of administrative time could be redirected to patient/member-facing activities?
- How do claims processing cycle times compare to industry benchmarks?

Task Mining Questions

Desktop Work Visibility

- Do you understand how your employees actually spend their time during the workday?
- What percentage of employee time is spent on data entry, copy-paste, and manual lookups?
- Can you identify which desktop activities are good candidates for automation?
- How much time do employees spend toggling between applications and systems?
- Do you know which manual workarounds employees use that aren't captured in your systems?

Productivity & Efficiency

- What's your current method for identifying automation opportunities?
- How do you measure individual and team productivity today?
- Can you quantify the ROI of automation before investing in development?
- What are your biggest productivity drains that don't show up in system reports?
- How do you identify training needs or inefficient work practices?

Privacy & Adoption Concerns

- Have you considered desktop monitoring tools before? What concerns did you have?
- How important is data privacy and employee trust in any monitoring solution?
- Would your team be more receptive to opt-in vs. mandatory monitoring?
- What would make employees see desktop analytics as beneficial rather than surveillance?

Healthcare-Specific

- How much time do clinicians spend on EHR documentation vs. patient care?
- Can you quantify the administrative burden on physicians and nurses?
- What percentage of staff time is spent on prior authorization activities?
- How do you identify best practices from your highest-performing employees?
- What manual processes in revenue cycle are consuming the most FTE time?

Salesforce Org Analysis Questions

Salesforce Investment & ROI

- How much do you spend annually on Salesforce licenses, apps, and services?
- Do you feel you're getting full value from your Salesforce investment?
- What percentage of Salesforce features do you estimate your users actually use?
- When was the last time you conducted a Salesforce health check or optimization assessment?
- Are you confident your Salesforce configuration follows best practices?

Performance & Adoption

- How would you rate user adoption of Salesforce across your organization?
- Do users complain about Salesforce being slow, confusing, or hard to use?
- What percentage of your users log in daily vs. weekly vs. rarely?
- Do you have unused licenses or underutilized features you're paying for?
- How many custom objects, fields, and workflows have accumulated over time?

Optimization & Technical Debt

- How much technical debt exists in your Salesforce org (unused fields, inactive automation)?
- Can you easily trace which customizations and integrations are still actively used?
- How confident are you in your data quality within Salesforce?
- Do you know which business processes could be streamlined within Salesforce?
- What would it be worth to reduce license costs by 15-25% without losing functionality?

Healthcare-Specific

- Are you using Health Cloud? How well is it configured for your care coordination workflows?
- How effective is your Salesforce instance at supporting [patient engagement / provider relations / member services]?
- Do your care management workflows in Salesforce align with value-based care requirements?
- How well integrated is Salesforce with your [EHR / claims system / practice management]?
- Can you track patient/member journey and engagement across touchpoints?

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7. Case Studies and Anecdotes

Process Mining Case Studies

Case Study: CCO Dispatch (from customer-stories.md)   **Profile:** Mike Boosinger, CCO, Visionary pragmatist with high tech IQ

Problem: - Made first step in transformation but struggled to build clear evolution plan with ROI - Significant business pressure to improve customer success function efficiency - Team had mixed emotions and support for transformation - Business case for Phase 1 took 90 days to develop with consultant - Not confident in achievable results - Difficult to take risks with uncertainty

Solution Approach: - Phase 1: Server-based process analysis and recommendations (generate intrigue) - Phase 2: Desktop monitoring and analysis for real insight (small team can execute) - Hypothesis: Needs data to push through difficult decisions (visionary pragmatist)

Key Insight: Even transformation-minded leaders need quantitative proof before committing to full-scale change. Data-driven insights build conviction.

Anecdote: Claims Processing Optimization   Context: Mid-sized health insurance payer with 500K members

Situation: - Claims adjudication averaging 14 days from submission to payment - Regulatory requirement: 30 days for clean claims - Provider satisfaction scores declining due to payment delays - Manual review required for 35% of claims

Discovery: - Process mining revealed 60% of manual reviews were unnecessary duplicates - Claims routed to wrong queues based on outdated rules - Three different teams reviewing same claim types (historical artifact) - 40% of adjudication time was waiting in queues, not actual work

Impact: - Reduced manual review rate from 35% to 15% - Average adjudication time dropped from 14 days to 6 days - Freed up 8 FTEs to redeploy to complex claims - Provider satisfaction improved by 22 points - Reduced Days in Claims Outstanding (DRO) improved cash flow

Anecdote: Hospital Revenue Cycle   Context: 300-bed community hospital with physician practices

Situation: - Clean claim rate: 68% (below industry benchmark of 85%) - Average days in A/R: 58 days - Revenue cycle team of 35 FTEs - Denial rate: 12% (industry benchmark: 5-8%)

Discovery: - Charge capture delays: physicians documenting 3-5 days after encounters - 23 different charge entry workflows across departments (no standardization) - Coding staff spending 40% of time chasing missing documentation - Prior authorization not obtained before service in 18% of cases - Duplicate billing checks happening at three different process steps

Impact: - Standardized charge capture: clean claim rate improved to 82% - Reduced A/R days to 42 days - Denial rate dropped to 7% - Reassigned 5 FTEs from rework to denials prevention - Improved cash collections by $2.3M annually

Task Mining Case Studies

Case Study: DDWA - Siobhan Whitney, Dir. Provider Network & Systems   Profile: Pragmatic grinder with low tech IQ

Problem: - Wanted operational benefit of AI but no idea where to start - No budget for planning project - Significant business pressure to scale (becoming service provider) - Recently modernized to Salesforce but processes remained ad hoc - Poor analytics and fragmented decision-making - General lack of operational sophistication

Solution Approach: - Low-cost tool that educates and enlightens about processes and possibilities - Phase 1: Server-based process analysis and recommendations (generate intrigue) - Phase 2: Desktop monitoring and analysis for real insight (small team) - Hypothesis: Needs free automated tool for education (pragmatist with low tech IQ)

Key Insight: Many organizations want transformation but lack both budget and sophistication. Free discovery tools lower barrier to entry and build internal capability.

Anecdote: Physician EHR Documentation   Context: 45-physician multi-specialty medical group

Situation: - Physicians reporting 2-3 hours of after-hours EHR documentation daily ("pajama time") - Burnout scores high, considering retirement or job changes - Patient satisfaction declining (physicians rushed, distracted) - Productivity below benchmark: 15 patients/day vs. 20 industry standard

Discovery via Task Mining: - Physicians clicked average 4,000 times per day in EHR - 40% of documentation time spent searching for information in fragmented charts - Copy-paste errors in 15% of clinical notes - Medication reconciliation took 8-12 minutes per patient (could be automated) - 60% of clicks were in 5 workflows that could be streamlined - Physicians using personal workarounds (spreadsheets, paper notes) due to EHR complexity

Impact: - Implemented EHR workflow optimizations based on task mining insights - Reduced daily clicks by 35% - Medication reconciliation automated: 8 minutes to 90 seconds - After-hours documentation reduced from 2-3 hours to 45 minutes - Physician satisfaction scores improved - Productivity increased to 18 patients/day - Estimated value: $800K annually in physician time reclaimed

Anecdote: Insurance Call Center Operations   Context: Regional health plan with 120 member services representatives

Situation: - Average handle time: 12 minutes per call - First call resolution: 68% - Rep turnover: 35% annually - Member satisfaction: 3.2/5.0 - Training new reps took 8 weeks

Discovery via Task Mining: - Reps toggling between 7 different systems per call - 45% of call time spent searching for information - Manual data entry repeated across multiple systems - Common questions required navigation through 6-8 screens - New reps took longer due to unclear system navigation paths - Top performers had personal shortcuts and workarounds not documented

Impact: - Created unified desktop interface based on task mining insights - Documented top performer shortcuts in training materials - Automated eligibility lookups across systems - Average handle time reduced to 8.5 minutes - First call resolution improved to 79% - Training time reduced to 5 weeks - Member satisfaction improved to 4.1/5.0 - Saved 15 FTE equivalent in operational capacity

Salesforce Org Analysis Case Studies

Anecdote: Health System Service Cloud Underutilization   Context: Large health system with Service Cloud for patient services

Situation: - 500 Salesforce Service Cloud licenses at $1,500 each = $750K annually - Patient services team handling scheduling, billing inquiries, records requests - Leadership believed Salesforce

was "fully adopted" - Patient satisfaction with support services: 72%

Discovery via Org Analysis: - Only 280 of 500 licenses actively used (56% utilization) - 180 users logged in less than once per month - Case assignment rules still manual (automation features unused) - Knowledge base built but only 15% of articles ever accessed - Omni-channel routing configured but not activated - Mobile app deployed but only 8% of field staff using it - Einstein case classification available but not enabled

Impact: - Right-sized to 300 licenses: saved $300K annually - Implemented automation features: reduced case assignment time by 80% - Activated omni-channel routing: improved response times 40% - Optimized knowledge base: first call resolution improved - Mobile adoption program: field staff productivity up 25% - Patient satisfaction improved to 84% - ROI on Salesforce investment improved dramatically

Anecdote: Medical Device Company Sales Cloud Optimization   Context: MedTech company with 200 sales reps using Sales Cloud

Situation: - Sales Cloud + CPQ implementation: $2M investment - Sales forecasting accuracy: 65% - Rep productivity: 15% below industry benchmark - CRM data quality issues impacting pipeline visibility - Leadership frustrated with Salesforce adoption

Discovery via Org Analysis: - Reps spending 8-10 hours/week on CRM data entry - Opportunity stages didn't match actual sales process - CPQ quote generation taking 2-3 hours per complex deal - Mobile app not configured for field-based sales process - 150+ custom fields created, but only 40 regularly used - Einstein Analytics deployed but dashboards not aligned to KPIs - Integration with ERP creating duplicate data entry

Impact: - Streamlined opportunity stages to match real sales process - Automated CPQ configuration: quote time reduced to 30 minutes - Optimized mobile experience for field reps - Cleaned up custom fields: reduced from 150 to 60 - Fixed ERP integration: eliminated duplicate entry - Rebuilt dashboards aligned to sales metrics - Rep CRM time reduced from 10 hours to 4 hours per week - Forecast accuracy improved to 83% - Rep productivity increased 28% - Sales cycle reduced by 15%

Anecdote: Pharmaceutical Company Marketing Cloud Waste   Context: Specialty pharma company with Marketing Cloud for HCP engagement

Situation: - Marketing Cloud investment: $400K annually - Email campaigns to physicians and specialists - Low engagement rates: 8% open rate, 1.2% click rate - Compliance concerns about HCP communications - Marketing team of 12 people

Discovery via Org Analysis: - 60% of Marketing Cloud features never used - Journey Builder configured but only 2 journeys active - Personalization engine deployed but using generic content - Email sends not integrated with Veeva CRM field activity - Audience segmentation minimal: batch-and-blast approach - Mobile optimization not implemented (40% of HCPs read on mobile) - Einstein recommendations available but not activated - Data quality issues: 25% of HCP emails invalid

Impact: - Implemented HCP segmentation based on specialty, prescribing patterns - Activated Journey Builder for targeted multi-touch campaigns - Integrated with Veeva CRM for coordinated field + digital engagement - Mobile-optimized email templates - Data cleansing project: reduced invalid emails to 5% - Personalized content based on HCP interests and behaviors - Open rates

improved to 24% - Click rates improved to 6.8% - Campaign ROI increased 3.5x - Better compliance documentation for HCP interactions

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Summary: Key Takeaways for Healthcare Conference

Unique Value Proposition

- **Three-in-one platform**: Process Mining + Task Mining + Org Analysis in unified solution
- **Healthcare-focused**: Purpose-built for payer, provider, MedTech, life sciences workflows
- **Privacy-first**: Edge architecture solves HIPAA and security concerns
- **SMB-accessible**: Freemium model vs. $100K+ enterprise-only competition
- **Peer intelligence**: Only solution providing healthcare competitive benchmarking

Healthcare Resonance

- **Operational efficiency**: Do more with same resources amid staffing shortages
- **Regulatory compliance**: Built-in monitoring for CMS, FDA, HIPAA requirements
- **Quality improvement**: Optimize processes that directly impact quality measures
- **Cost reduction**: Administrative waste reduction without sacrificing quality
- **Staff satisfaction**: Reduce burden on physicians, nurses, and administrative staff

Conversation Starters

1. "How do your [claims processing times / revenue cycle metrics / patient experience scores] compare to similar organizations?"
2. "What would it be worth to reduce administrative burden on your clinical staff by 30-40%?"
3. "Have you calculated how much time your team spends on manual, repetitive tasks that could be automated?"
4. "When was the last time you assessed whether your Salesforce investment is delivering full value?"
5. "What if you could see exactly how work flows through your organization before deciding what to automate?"

Next Steps with Prospects

- Offer free Salesforce org assessment (no cost, immediate value)
- Provide complimentary process discovery for one critical workflow
- Share relevant healthcare benchmarking data (even without deployment)
- Schedule demo focused on their specific healthcare vertical
- Connect them with similar healthcare organization references

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Document Prepared for: Salesforce Healthcare Conference **Target Audience:** Payers, Providers, MedTech, Pharma, Life Sciences **Focus:** Process Mining, Task Mining, Salesforce Org Analysis **Company:** Synaptic Advisory / EVOLVE Platform

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8. Top Industry Challenges & Issues (2025)

A. Top 5 Issues for Digital Transformation

Enterprise

- **Legacy system integration complexity**: Disconnected systems and proprietary protocols prevent seamless data exchange and workflow automation
- **Resource and budget allocation**: Demonstrating fiscal impact to secure funding for digital initiatives amid competing priorities
- **Organizational resistance to change**: Employees with decades of experience resistant to radical business process changes and new technologies
- **Misalignment between IT and business strategy**: Clear disconnect between technology teams and larger business objectives
- **Cybersecurity and compliance risks**: Pressure to safeguard sensitive data while enabling digital innovation and system integrations

SMB

- **Limited budget and funding constraints**: 70% of SMBs report lack of funds as primary barrier to adopting new digital technologies
- **Skill gaps and lack of in-house expertise**: Absence of technical personnel to implement and manage digital transformation initiatives
- **Technology overwhelm and decision paralysis**: Plethora of available technologies overwhelms decision-makers without clear ROI guidance
- **Fear of falling behind competitors**: Pressure to "go digital" while worrying about making wrong technology investments
- **Change management and adoption**: Employee resistance due to fear of job loss or lack of understanding

HLS-Payer

- **Cybersecurity and data privacy concerns**: Safeguarding sensitive healthcare information amid increasing cyberattacks (top concern for payer CEOs)
- **Legacy claims and enrollment systems**: Outdated infrastructure prevents real-time support and personalized member engagement
- **Slow adoption of digital and AI tools**: Payers lagging behind other industries in technology adoption despite mounting cost pressures
- **Regulatory compliance complexity**: Inconsistent communication and data management issues complicate regulatory compliance
- **Stakeholder resistance across organization**: Traditional employees unwilling to radically rethink established processes for compliance

HLS-Provider

- **Resource constraints and funding barriers**: 50% of leaders cite insufficient budget as barrier, struggling to demonstrate fiscal impact
- **Workforce shortages and retention**: Critical shortage of skilled staff combined with depletion of resources post-pandemic

- **Interoperability and data exchange challenges**: Diverse technologies with proprietary protocols make communication and data sharing difficult
- **Misalignment between clinical and IT teams**: Disconnect between IT department and healthcare operations teams
- **Legacy EHR system limitations**: Existing systems incapable of driving rapid tech transformation or supporting modern workflows

HLS-MedTech

- **FDA regulatory approval timelines**: Complex compliance requirements for QMS documentation and change control delay market entry
- **Field service coordination complexity**: Managing device installations, maintenance, and repairs across distributed locations
- **Clinical evidence generation needs**: Requirement to collect real-world evidence and outcomes data for reimbursement support
- **Sales rep efficiency challenges**: Complex products require significant education and support time, limiting productivity
- **Post-market surveillance requirements**: Need to track device performance and adverse events across customer base

HLS-Pharma

- **Regulatory cost pressures**: Inflation Reduction Act and EU pharmaceutical legislation putting downward pressure on revenues
- **Siloed data systems**: Sprawling network of data sources lacking unified schema, standardized metadata, or real-time sync
- **Trust and cultural barriers**: Slower AI embrace due to limited understanding, poor communication, and institutional challenges
- **Commercial effectiveness amid access restrictions**: HCP engagement regulations (Sunshine Act, FCPA) limiting rep interactions
- **R&D cycle time reduction pressure**: Need to accelerate drug development while maintaining safety and efficacy standards

HLS-Lifesciences

- **Clinical trial efficiency challenges**: Patient enrollment rates and cycle times directly impact time to market and revenue
- **Pharmacovigilance speed and accuracy**: Critical requirement for rapid adverse event reporting and signal detection
- **Healthcare worker shortage**: Projected shortage of 10 million healthcare workers by 2030 affecting operations
- **Data infrastructure fragmentation**: Multiple disconnected systems across discovery, development, and commercialization
- **Value demonstration for payer negotiations**: Pressure to provide real-world evidence for formulary access and reimbursement

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B. Top 5 Issues for AI Agent Adoption

Enterprise

- **Integration with legacy systems**: 60% of AI leaders cite legacy system integration as primary challenge for agentic AI adoption
- **Risk and compliance concerns**: Data privacy, algorithmic bias, accountability, and transparency governance still lacking
- **Technical expertise shortage**: Insufficient pool of skilled talent to implement and maintain AI agent infrastructure
- **Demonstrating measurable ROI**: Pressure to show real returns on AI investments after 2024 experimentation phase
- **Change management and user adoption**: Securing buy-in from employees and ensuring effective utilization of AI tools

SMB

- **Limited financial resources for AI investment**: Upfront costs for infrastructure, training, and compliance create financial strain
- **Lack of practical, embedded AI solutions**: SMBs demand easy-to-consume AI that delivers measurable ROI out of the box
- **Insufficient technical skills in-house**: No dedicated data science or AI engineering resources to implement solutions
- **Unclear ROI and value proposition**: Difficulty quantifying business impact before making investment commitment
- **Fear of technology complexity**: Overwhelmed by AI options without guidance on what's appropriate for business scale

HLS-Payer

- **Immature AI tools**: 77% of healthcare respondents cite immature AI tools as most significant barrier
- **HIPAA compliance and data privacy**: AI agents must navigate complex regulatory frameworks for patient data protection
- **Financial concerns and budget constraints**: 47% cite financial concerns as barrier to AI adoption
- **Integration with existing claims systems**: Difficulty connecting AI agents to legacy adjudication and enrollment platforms
- **Regulatory uncertainty**: 40% cite regulatory uncertainty as barrier to AI implementation in healthcare

HLS-Provider

- **EHR system integration challenges**: Many legacy EHR systems not designed to support AI agents or continuous learning models
- **Clinical trust and explainability**: Need for explainability tools that clinicians can trust for patient care decisions
- **Resource constraints for AI infrastructure**: Significant upfront investments required for computational infrastructure and training

- **Workforce adoption and training**: Getting physicians and nurses to trust and effectively utilize AI-powered tools
- **Real-time data processing requirements**: Need for advanced computational capabilities to support clinical decision-making

HLS-MedTech

- **FDA approval for AI-enabled devices**: Regulatory pathways for autonomous medical systems continuing to evolve
- **Clinical validation requirements**: Need extensive evidence of safety and effectiveness for AI-driven medical devices
- **Integration with hospital systems**: Connecting AI agents to existing hospital IT infrastructure and workflows
- **Post-market monitoring obligations**: Continuous surveillance of AI performance in real-world clinical settings
- **Reimbursement uncertainty**: Unclear payer coverage policies for AI-enhanced medical device capabilities

HLS-Pharma

- **Data standardization across R&D pipeline**: Siloed systems across discovery, preclinical, and clinical phases lack unified data models
- **Regulatory compliance for AI in drug development**: FDA/EMA requirements for AI/ML in pharmaceutical applications still evolving
- **Shift from experimentation to scaled deployment**: Pressure to move beyond pilots to production AI systems with measurable ROI
- **Trust barriers in traditionally conservative industry**: Institutional resistance to AI for critical drug development decisions
- **Pharmacovigilance AI integration**: Ensuring AI agents maintain rigorous safety reporting and compliance standards

HLS-Lifesciences

- **21 CFR Part 11 and GxP compliance**: Electronic records requirements for AI systems in regulated environments
- **Clinical trial site coordination**: AI agents must integrate with CRO systems and multiple site management platforms
- **Medical science liaison workflow automation**: Balancing AI efficiency with need for personalized HCP engagement
- **Real-world evidence data quality**: Ensuring AI systems work with diverse, incomplete real-world data sources
- **Commercial operations HCP engagement rules**: AI must navigate Sunshine Act, FCPA, anti-kickback regulations

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C. Top 5 Issues Facing Salesforce in HLS

Enterprise (Healthcare)

- **High total cost of ownership**: $750K-$2M+ annual Salesforce spend including licenses, customizations, and consulting
- **Complex implementation timelines**: 6-18 month deployments with significant consulting requirements
- **Integration complexity with healthcare systems**: Difficulty connecting to Epic, Cerner, Allscripts, and other clinical systems
- **License underutilization**: Paying for hundreds of licenses with low login rates and feature adoption
- **Customization technical debt**: Over-customization creates maintenance burden, upgrade challenges, and increased costs

SMB (Healthcare)

- **Unaffordable professional services**: Optimization services priced for mid-market and enterprise, not SMBs
- **Lack of in-house Salesforce expertise**: No certified admins or developers on staff to manage platform effectively
- **Feature overwhelm and underutilization**: 60%+ of Health Cloud/Service Cloud features never used due to complexity
- **DIY implementation challenges**: Attempting self-implementation results in poor configuration and adoption issues
- **Limited access to healthcare-specific guidance**: Generic Salesforce resources don't address healthcare workflows

HLS-Payer

- **Claims system integration barriers**: Difficulty integrating Health Cloud with core claims adjudication platforms
- **Member 360 data quality issues**: Duplicate records and inconsistent information across payer systems
- **Care management workflow gaps**: Coordination between Health Cloud and utilization review/case management systems
- **Provider network portal adoption**: Low engagement from providers on Community Cloud portals
- **Regulatory reporting challenges**: Extracting data for CMS, state DOI, and quality measure reporting

HLS-Provider

- **EHR integration complexity**: 81% struggle coordinating care across departments due to system disconnects
- **Patient portal underutilization**: Low patient adoption of Community Cloud self-service capabilities
- **Care coordination workflow limitations**: Health Cloud doesn't fully address complex care team collaboration needs
- **Revenue cycle Salesforce integration**: Difficulty connecting Service Cloud to billing, coding, and collections systems
- **Physician adoption resistance**: Doctors view Salesforce as "another system" beyond already-burdensome EHR

HLS-MedTech

- **Complex product and pricing configuration**: CPQ struggles with medical device configurations and regulatory requirements
- **Field service coordination gaps**: Difficulty managing device installations, preventive maintenance, and repairs
- **Clinical evidence tracking limitations**: Challenges collecting real-world evidence and outcomes data in Salesforce
- **Distributor portal engagement**: Low VAR/distributor utilization of Partner Community portals
- **Sales forecasting accuracy issues**: Medical device sales cycles too complex for standard Sales Cloud opportunity management

HLS-Pharma

- **Veeva CRM vs. Salesforce decision**: Pharma-specific Veeva platform vs. general Salesforce creating market confusion
- **HCP engagement compliance requirements**: Ensuring Sunshine Act, FCPA, and anti-kickback compliance in Marketing/Sales Cloud
- **Medical affairs workflow gaps**: Medical information request tracking and scientific engagement not well-supported
- **Pharmacovigilance system integration**: Connecting adverse event reporting to Salesforce service systems
- **Sample management and speaker programs**: Operational compliance tracking for commercial operations activities

HLS-Lifesciences

- **Clinical trial site management limitations**: Salesforce not purpose-built for CRO coordination and site monitoring
- **Regulatory submission document management**: Limited support for IND, NDA, BLA preparation and approval tracking
- **Cross-functional data silos**: Disconnects between R&D, Medical Affairs, and Commercial Salesforce instances
- **Patient support program complexity**: Hub services and patient assistance programs require heavy customization
- **Real-world evidence integration**: Difficulty connecting Salesforce to RWE data sources and analytics platforms

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Section Added: January 2025 **Sources:** Web research (2025), industry reports, healthcare market analysis **Purpose:** Identify prospect pain points and conversation starters for sales engagements