



Pentax Medical: Centralized Customer Management

The Challenge

Medical Industry Regulations: Pentax Medical wanted to track sales pipelines, opportunities and accounting information—plus generate quotes—from one user-friendly CRM system. To do so, they needed an implementation partner that was familiar with the rigorous compliance requirements of the medical devices industry.

- Establish a secure CRM environment compliant with strict medical industry standards
- Automate a time-consuming, labor-intensive quote process
- Integration of calendars, email and SharePoint, required a Microsoft solution

Client Overview



Pentax Medical is a division of the Hoya Group.

INDUSTRY: Life Sciences—providing endoscopic products and services for gastroenterology (GI)

COMPANY SIZE: 250+ users in sales management, marketing and sales support functions

Established in 1919 in Japan, PENTAX Medical is a globally diversified company with R&D innovation and manufacturing centers in Japan, Europe and the United States. Through leading-edge optical technologies, PENTAX Medical is providing the most advanced clinically relevant endo-imaging solutions. Together with comprehensive customer service offerings, PENTAX Medical is collaborating with customers worldwide to create long-term partnerships and customer satisfaction.



The Solution

Velosio provided:

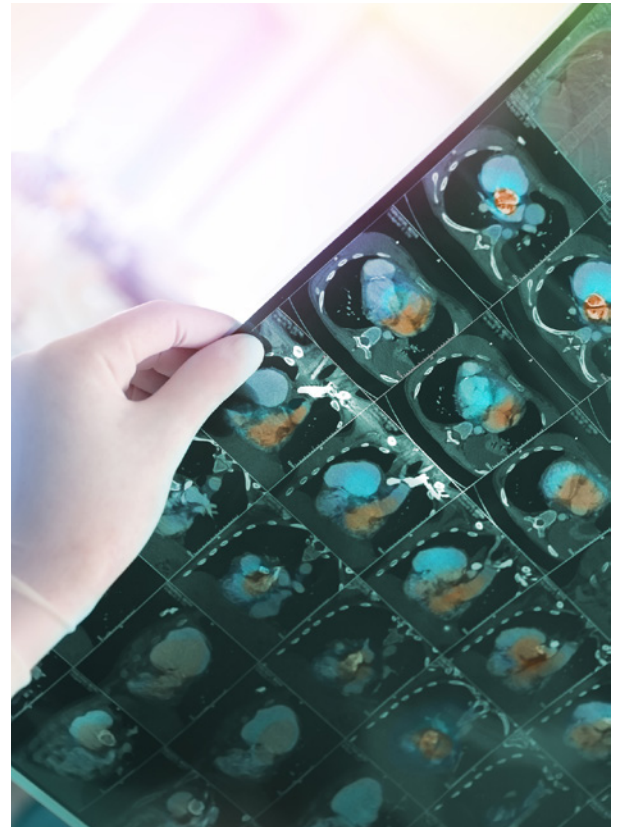
- Microsoft Dynamics 365 for Sales integrated with SAP R3, providing coordinated account, contact, activity, opportunity and quoting functionality
- CRM dashboards, focusing on sales data, pipeline, forecasting, customer rankings and rep activities
- QlikView, a business information tool, providing faster and more robust metrics by automating data extraction from multiple sources

The Results

- **Faster Quotes**—Generate quotes directly from CRM and deliver it to customers the same day
- **Consolidated Information**—Reps can access customer information all in one place
- **Precise Decision Making**—Trend tracking and sales forecasting is easier now that live data feeds automated analytics and reporting
- **Long-term Solution**—Pentax has found an IT and business solutions partner they trust

Working with Velosio

“Through medical industry experience and customer collaboration, Velosio implemented an integrated CRM/Accounting solution. That was only the beginning of this long-term customer relationship.”



Ready to grow your business?

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