

**SugarCRM Customer Stories**  
**Orion Health.**

**Empowering  
and managing  
sales for peak  
performance.**



# Our CRM Maverick.

Dave Canham has worked in technology sales and marketing for more than three decades, leading sales performance initiatives for the past 10 years. As Vice President of Sales Excellence for Orion Health, his role is to help the sales team reach its full potential by giving them the tools, processes and information to boost their performance and win rate. Customer Relationship Management (CRM) is his weapon of choice. Canham has the support of every department across the business in his mission to reshape Orion Health's sales processes and CRM culture.

Canham can relate to the challenges salespeople face – he's held the role and coached it. He knows that CRM needs to easily facilitate the things salespeople need to do to perform at their best – so it's critical to eliminate the reasons salespeople give for not using CRM. He explains: "CRM must be full of things that are intuitively obvious and instantly actionable. I'm in the business of removing obstacles and excuses!"

When it comes to technical delivery of CRM, Canham's approach is practical: "Smart mavericks don't re-invent the wheel. We exhaust functionality before we race off and build something new." Flexibility and openness are important here, and Canham adds: "We need to be creative with what we have and Sugar gives us the freedom to do this. We're getting the most out of it and trying to avoid unnecessary complexity."

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# Orion Health.

Orion Health was founded in 1993. Headquartered in Auckland, New Zealand, the company employs more than 1,200 people in 24 offices across 15 countries, and its solutions help facilitate healthcare for more than 110 million patients in 30+ countries.

[www.orionhealth.com.au](http://www.orionhealth.com.au)

## The Situation.

Orion Health is a global organisation whose offerings are complex. Their sales processes needed to be improved and standardised across all locations worldwide, to enable them to monitor and manage performance and see where support is needed, learn from the best and continuously improve the sales function overall.

## Orion Health & the global health sector.

The healthcare market has all kinds of challenges. Different factors – social, economic, political – affect healthcare services and decision-making in different parts of the world, but one common theme is the desire to always deliver the best possible care to patients. Healthcare providers need to deal with constant change, but often there's a reluctance for change because, ultimately, lives are at stake.

Orion Health works in this complex space, helping healthcare providers to use health data from various sources to deliver better services at reduced cost. Orion Health's own technology platform enables customers to utilise big data – like prescriptions and lab results – to provide better individualised care. Orion Health's solution sales are complex and tend to span many months, so maintaining momentum and giving salespeople the right support at the right time is critical.

Any business running a sales force in the healthcare industry will have similar challenges, and those who use tools like CRM to support sales and focus on performance management will do best.

**Dave Canham**  
Vice President of Sales Excellence,  
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# Challenges.

As a global organisation with complex offerings, Orion Health needed to make its sales approach sustainable, scalable, consistent and measurable.

## Optimise sales processes to improve performance.

Canham knows that earning a strategic advisory relationship status with customers and having strong sales processes are two factors that will make Orion Health more successful. To guide Orion Health's sales teams through complex sales journeys and build their capabilities for strategic selling, he needed to set up strong new processes with clear expectations at each stage.

"The majority of salespeople can thrive with the right support, and this comes down to having strong processes that enable the right tools, support, information and behaviours at the right times," explains Canham.

## Create a great user experience.

Orion Health had been using Sugar for some time, but it wasn't set up to align to the Orion Health Sales Process, and adoption was patchy. "No-one really used to use Orion Health's CRM as intended. It wasn't sales focused and people didn't think CRM was the place to collaborate or access the single source of truth," says Canham.

From this, Canham identified one key challenge that tends to affect sales and CRM performance in any organisation: CRM user experience. He needed to improve user experience to drive CRM adoption, which would lead to more collaboration and better pipeline information management.

## Monitoring & reporting on sales performance.

"Executive teams have insatiable appetites for insight into sales performance, and the way to deliver this is through CRM," says Canham. But Orion Health's sales managers couldn't always trust the information they extracted from the previous CRM system. This needed to change.

To illustrate that CRM is a valuable investment in Orion Health's growth, Canham also needed to be able to demonstrate the return it delivers, for example through proof of improved sales processes and performance. He needed to bake these metrics into CRM.



To enhance sales performance we need to get our processes right, using CRM as the backbone. To get salespeople using CRM, we have to create a good experience.

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# CRM strategy solution.

Orion Health had been using Sugar for about seven years, and Canham needed to decide whether to upgrade or move to a new solution. He weighed up a number of options including Salesforce and Oracle, and ultimately felt that Sugar would provide a good interface and experience, and would deliver significantly more value for money. He explains: "I feel like we get 90% of the value we'd get from Salesforce at 50% of the cost."

Canham secured approval from the executive team for the upgrade from Sugar Version 6 to 7.7, and to integrate with other business applications like Marketo.

He approached the upgrade as a totally greenfield solution, shaping it from scratch. At the start of his role at Orion Health, Canham reviewed sales process and started making changes. He began working with the sales teams on finding new ways to become more effective at strategic and complex selling and aligning Orion Health's CRM principles, methodology and terminology with new sales processes.

The ability to easily configure vs customise without significant cost burden was, and remains, critical. "We need to wrap our processes around CRM but also be able to shape it, and Sugar gives us this flexibility. We can access the large Sugar community, use their ideas, easily configure and deploy solutions," says Canham.

## Implementation.

"The implementation was a success thanks to a remarkable team effort across the business, bringing together people from IT, Marketing, Operations, Sales, Service and Product Management," explains Canham.

SugarCRM partner CloudTech worked with Orion Health to get the new solution in place.

"Implementation went well and we've had an excellent experience with CloudTech so far; we're doing more work with them so that speaks for itself," says Canham. "They spent time understanding what we'd done with Sugar in the past and what we need going forward. It was good to work with people who understand our business and we've seen the benefit of their experience."



**Canham set out to empower and measure the sales force, and make CRM a pleasure to use.**

# Results so far.

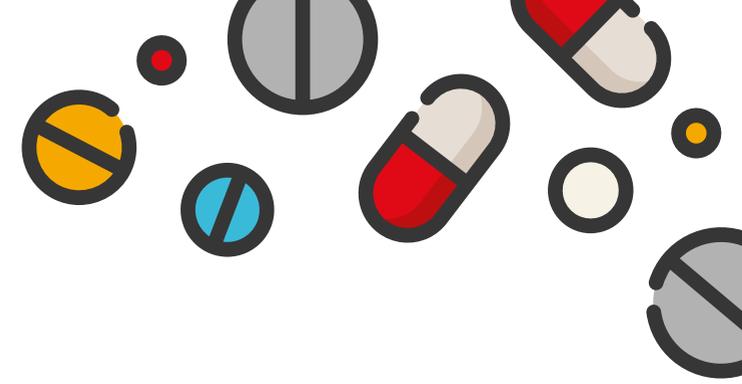
## Sales processes bring clarity and efficiency.

Process improvement is ongoing, as Canham explains: "There will always be room for improvement but we've created strong processes in CRM with clear expectations at each stage. We can monitor and manage in real time to drive the right behaviours, which will improve our win rate and shorten sales cycles wherever possible."

## User experience that drives adoption and collaboration.

Canham has used Sugar's flexible interface to create the kind of user experience he's aiming for, saying "it's clear and simple, and the system is highly configurable so we can smooth out barriers in the user experience as we encounter them."

Canham is using CRM as the foundation for a cultural shift towards salespeople being responsible for data in the CRM. Firstly he tackles the reasons salespeople give for not updating CRM information. Secondly he motivates his salespeople to use CRM to inform and collaborate with others who help them sell, demonstrate and deploy Orion Health solutions.



Sugar's mobile app is one example of how Canham is eliminating the reasons for information not being kept up to date. "With the new mobile app we've made it easier for salespeople to do the right thing – it only takes a few moments to update CRM and they can do it from anywhere. Now since our upgrade, the number of opportunities updated within last 30 days has shot up from 63% to 90%."

Canham's plan to drive user adoption is working, and as a result there's been a significant increase in the quality and quantity of pipeline information. "We've made lots of headway since the upgrade. If you'd asked people what they thought of CRM a year ago, you'd get a lot of negative feedback. But based on a recent survey, 74% of the sales team are satisfied or very satisfied with CRM overall. So people are still not totally satisfied – which is always a good thing – but it's a huge improvement. These days the target mentality is 'we get to use it' not 'we've got to use it'."

**The number of opportunities updated within last 30 days has risen from 63% to 90% due to improved processes.**



# Results so far.

## Tracking and boosting performance.

Canham's team has built metrics into CRM to analyse sales performance based on information he can trust. This includes granular metrics that shed light on real-time progress and outlook, like the number of targeted buying influencers per opportunity, and how many times a close date changes.

## Demonstrating results to the business.

"We talk to the business about traction we're getting with the new CRM and sales processes," says Canham. "We show how we're doing pipeline reviews, using dashboards and drilling down in real time. We're explaining how our work is bringing about changes and improvements in sales behaviour, cross-functional collaboration and performance."



These days the target CRM mentality is 'we get to use it' not 'we've got to use it'

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## Before & after.

Previously, Orion Health's sales processes were more varied and inconsistent, but things are very different today. Canham explains: "If we'd run a pipeline review we'd be exporting information we could only partly trust, and it would already be out of date by the time it hit our desks. Now, we have real-time information at our fingertips. We can have instant conversations and make changes on the fly. We're working more in real time, we can trust our information, and we have more collaboration."

## Where to next?

Since the upgrade, Orion Health has added almost 25% more users and everyone is using the system much more than before. Orion Health will re-evaluate whether to continue with on-premise hosting or move to a solution like AWS or Azure. "We can't become a victim of our own success. Good user experience is fundamental to our CRM strategy. No matter how good our CRM is, if people have to wait too long for response, they won't use it!"

Canham will also be working on optimising the information in Orion Health's CRM, creating a single view of the customer, and addressing the entire customer lifecycle. He'll also be interested in trying Sugar's forecasting module once it's been further developed.

## Last word from our Change Agent.

The majority of your salespeople can be difference makers. So don't let them fail! Give them strong processes, the right tools and information, and help them collaborate. To create this environment you need to understand both the sales perspective and the business perspective. And you need to be able to challenge both sides!



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# SugarCRM.

SugarCRM's market-leading Customer Relationship Management (CRM) platform is an indispensable tool for every individual who engages with customers. From sellers, marketers and customer support agents, to receptionists and executives, Sugar provides enhanced intelligence around every user, helping employees make better decisions and create extraordinary customer relationships.

## APAC Headquarters

Level 40  
Northpoint Tower  
100 Miller St  
North Sydney  
NSW 2060, Australia

Phone:  
+61.2.9931.7849

[www.sugarcrm.com](http://www.sugarcrm.com)

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## CloudTech.

CloudTech is a cloud technology solutions provider based in Auckland, NZ. CloudTech implements and supports cloud-based CRM and marketing automation tools, delivering great business outcomes through the clever application of these technologies.

To learn more, please visit  
[www.cloudtech.co.nz](http://www.cloudtech.co.nz)

