

## LeanTaas Implements Industrial-Strength Infrastructure to Advance *Their Mission for Better Healthcare*

### CHALLENGE

LeanTaas develops the leading ai-driven digital transformation platform for healthcare. Their HIPAA-compliant, non-invasive cloud-based SaaS platform products, iQueue for Operating Rooms, for Infusion Centers, and for Inpatient Beds, are used by over 400 of the nation's leading hospitals to manage time, utilization, scheduling, and capacity. LeanTaas' patented technologies are increasing patient access to medical care and helping healthcare providers do more with less.

Healthcare reform, an aging population, and a global pandemic, have all quickly escalated the demand for healthcare services. To advance with the market, LeanTaas needed an industrial strength CRM platform to scale and grow their business. Their tool at the time, Hubspot, met the needs of their marketing automation efforts, but also needed to be able to integrate with their healthcare system data platform and their accounting system, NetSuite.

Anthony Guacci, Director of Sales Operations, had experience with Salesforce in the past and knew that the technology would help the team in their next initiatives on their mission to solve tough operational problems in healthcare.

### SOLUTION

As LeanTaas brought in Salesforce, they needed a partner who could not only implement the system and configure it according to the team's business processes, but who could also ensure efficient and accurate data migration while advising best practices. Anthony was referred to SaaScend by LeanTaas' Salesforce representative and met with the Founder, Craig Jordan.

## A Partnership to Build the Infrastructure

The two teams partnered to first lay out their strategy for how the CRM needed to be configured to support LeanTaas' business processes. A data hierarchy needed to be established to reflect the parent child relationships between the hospitals and the healthcare systems they belonged to. As customer product utilization fluctuated due to everchanging patient needs, sales, finance, and customer success, needed an efficient way to track their services, ensuring streamlined and accurate billing and contracting.

Anthony chose SaaScend because he wanted a long-term partnership with people that cared about the business and who could give the LeanTaas team the attention they deserved.

As the strategy and design became established, SaaScend went to work on the implementation and configuration of Salesforce. The team migrated data from Hubspot, LeanTaas' healthcare system data platform, and from NetSuite. SaaScend structured the system to coincide with the healthcare data hierarchy and to be able to integrate with Hubspot for their marketing automation efforts. They also designed the system, so that Finance could view Opportunity information at the Account level for quick access to billing data.

## RESULT

LeanTaas now has the foundational infrastructure in place to continue to grow and scale their business, helping healthcare providers continue to do more with less.

The team has their time maximized with quick access to accurate data in Salesforce that supports their billing and contracting systems out of Netsuite, ensuring that customers have precise insight into service agreements. The CRM is customized to help streamline sales processes, so that prospects can get faster access to LeanTaas' products.

Anthony expressed that what he appreciates the most about working with SaaScend, is the level of care that they have for LeanTaas' team and the business.

## LeanTaas continues their partnership with SaaScend

As the business expands for the future. Using Salesforce as the foundation, the teams will work to integrate the marketing, customer success, and product team processes, so that everyone has access to centralized data, empowering them to advance their operations, so that patients can have better access to medical care.



*"The team at SaaScend is very **personable**. I can sense that all they want to do is **help**, which is very **refreshing**."*

*-Anthony Guacci, Director, Sales Operations*

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