



# Syncsite Helps Compound Success for Pensacola Apothecary (now Everwell)

## CHALLENGE

As Pensacola Apothecary moved to expand operations to other states, it recognized it needed a purpose-built system to enable its mobile representatives and the office staff to monitor, track and analyze its customer relationships.

## SOLUTION

Pensacola Apothecary chose Syncsite to implement Infor CRM and CompoundRM, a solution designed expressly for the compounding pharmacy industry.

## RESULTS

Staff has more time to spend building strong customer relationships. Ticket tracking helps resolve customer issues quickly. Analytic reports show the relationship between visit quality, quantity and prescription writing.



- **Client**  
Pensacola Apothecary
- **Industry**  
Compounding Pharmacy
- **Headquarters**  
Pensacola, Florida
- **System**  
Infor CRM™, CompoundRM, Advanced Analytics

While the term apothecary has its roots in ancient Greece, today's modern apothecaries and compounding pharmacies are state of the art in every sense. Pensacola Apothecary, accredited by the Professional Compounding Centers of America (PCCA), combines leading-edge technology and a highly-trained staff with a level of personalized service that never goes out of style. In Syncsite, they found a business partner that shares that same commitment to service, excellence and dedication to their craft.

## PURPOSE-BUILT TOOL

As the company began its expansion outside of the state of Florida, it knew it needed to equip its mobile team of pharmacy educators with the tools to build long-term profitable relationships with doctors and practitioners throughout their territories. The tool they selected is CompoundRM from Syncsite, a purpose-built tool for compounding pharmacies that builds on the successful Infor CRM platform. Catherin Geri, Assistant Sales Manager for Pensacola Apothecary, recalls some of the struggles the company faced before it began using CompoundRM. "We had tried a few other CRM programs, including Salesforce®, but nothing worked for us. Our educators were still emailing a report in at the end of each day with a list of whom they saw and what

they spent. We then entered that into spreadsheets and other applications to try to get the data we wanted. When we learned that there was an application tailored to the compounding pharmacy industry, we jumped at the opportunity."

## MOBILE TOOL EMPOWERS TEAM

Each of the company's pharmaceutical educators is equipped with an iPhone®, an iPad® or both, running Infor CRM and CompoundRM. They can review address, contact information and notes before each visit. As each visit is logged in the software, geotracking records the educators' location to allow the company to monitor and audit their travels. "Our educators tell us that using CompoundRM allows them to focus more on building relationships and less on the administrative tasks that go along with any job," says Geri. "There's even a dashboard they can view that shows them their activities and the results of each activity. They have tangible evidence whether what they are doing is working."

## FLEXIBLE SECURITY AND CONTROL

Geri appreciates the flexible security and control features inherent in the software that enable her to control which educators have access to which accounts and what data elements they may edit. "We use the Lead

# Syncsite Helps Compound Success for Pensacola Apothecary (continued)

## PENSACOLA APOTHECARY

“We are able to track what our educators spend in their visits and whether that spending translates into prescription sales.”

Catherin Geri,  
Sales Manager

## MORE

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[www.syncsite.net](http://www.syncsite.net)

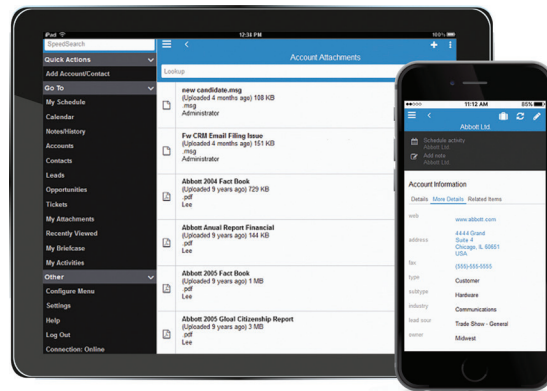
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category to record new opportunities, the Accounts function to represent practices and Contacts to represent doctors,” she explains. “If our educators meet a new doctor, they can enter them as a Lead initially, to be converted to an Account and Contact by our office team as we win their business.”



## EXTRA DOSE OF CUSTOMER SERVICE

The company has been able to boost its overall service levels through the use of CompoundRM. “Our educators are using the application in creative ways, such as noting the lunch preferences of the doctors and staff. It makes for a personal touch that is appreciated by our customers,” explains Geri. When a question or concern arises about a prescription, the office team opens a Ticket in CompoundRM that is automatically routed to the correct educator for resolution. “Resolving open tickets quickly is a high priority for us,” says Geri. “With this system, we are

able to head off issues that could slow down our service delivery, and show our physicians that we are committed to prompt, professional service.”

## ACCESS TO STRATEGIC DECISION MAKING DATA

Syncsite designed an import utility that brings prescription data by physician from its pharmaceutical software system into CompoundRM. The company is using that data to great advantage. Pensacola Apothecary now has access to data that helps it make strategic business decisions. “We are able to track what our educators spend in their visits and whether that spending translates into prescription sales,” says Geri. “We had no way of making this connection before. We can also correlate the frequency of visits with prescription writing, which helps us establish the optimal schedule to visit each of our customers. It’s real and measurable data that we can use to make strategic business decisions.”

## A PARTNER FOR THE LONG TERM

“Syncsite is amazing to work with,” concludes Geri. “We’ve gone from needing frequent hand holding, which they were more than willing to do, to expanding the software’s functionality. They always take the time to listen to us and to work with us to resolve any questions or issues. And when I ask for something new, they never say no, they say they’ll figure out how to make it happen. I haven’t worked with many vendors who maintain this level of service and commitment to their customers. It’s the way Pensacola Apothecary likes to operate, and we love to find business partners who value the same thing.”

## About Syncsite

Syncsite is a premier provider of Customer Relationship Management (CRM), Field Service Management (FSM), Business Intelligence (BI) and Marketing Automation (MA) solutions. Syncsite empowers companies in a variety of industries to manage their business data and leverage this information to strengthen customer relationships and enhance profitability.



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