

# Customer Success Story

## CUSTOMER SIZE:

500 - 1000

## INDUSTRY VERTICAL:

Hospitals  
Health Care

## SALESFORCE PRODUCTS:

Sales Cloud

## SERVICES:

Sales Cloud  
Web-to-Lead Form

## SALESFORCE LICENSES:

200

## ENGAGEMENT LENGTH:

6 Months

## Loop Health Boosts Lead Generation and Sales Efficiency with Salesforce Integration



### Original Challenge

Loop Health, with its mobile app, facilitates seamless interaction between doctors and patients. The app enables quick sharing of patient history and reports, streamlining the opinion-making process for physicians. Loop Health aims to enhance healthcare quality, working towards India's first health insurance company offering unlimited doctor visits, preventative care, and constant access to a dedicated team of doctors via their app.

Loop Health faces challenges in both lead generation and data accuracy, hindering sales efficiency. The lack of a systematic approach for lead tracking impacts flow and qualification, while non-standardized processes add complexity to pipeline management. To drive sales efficiency, a robust system with automated processes and clear pipeline visibility is essential for achieving a 360-degree view and improving CRM effectiveness.

### Outcome #1

#### Efficient Lead Management and Enhanced Visibility

Salesforce integration empowers Loop Health with streamlined lead operations, enabling swift updates and management. The simplified qualification process, combined with real-time visit reports and mobile features, ensures the sales team enjoys unparalleled visibility, facilitating the quick conversion of qualified leads into opportunities.

### Outcome #2

#### Elevated Collaboration and Visibility for Doctors and Patients

Loop Health improves collaboration between doctors and patients. Quick appointment creation, seamless data sharing, and online consultations save time for patients, fostering better healthcare interactions. The unified platform also provides management with enhanced visibility into the pipeline, driving teams towards closures and uncovering diverse business opportunities.