



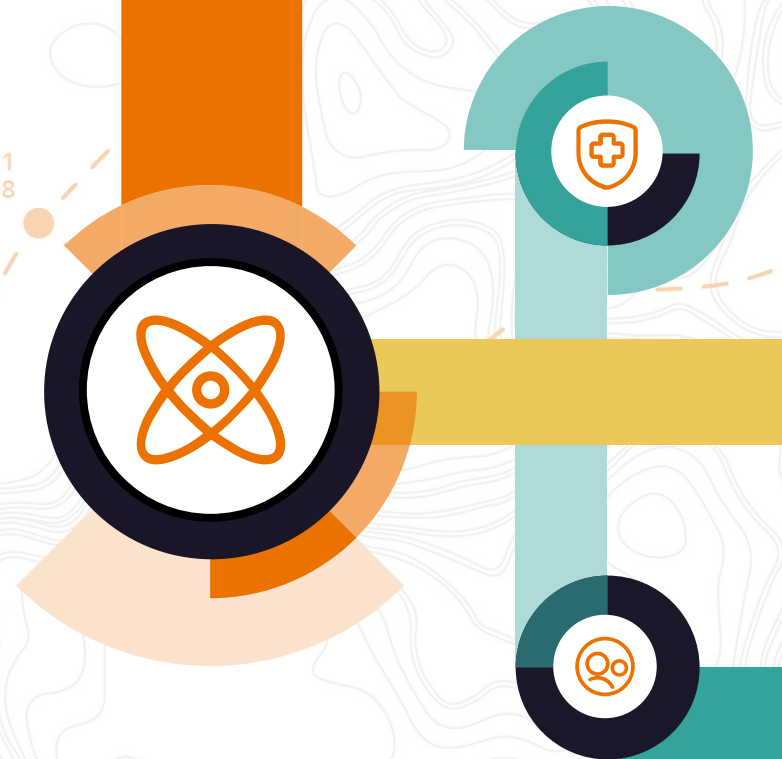
Connecting journeys, data and teams across healthcare and life sciences with Salesforce

Explore our case studies

Impact where it matters.

50.190731
30.820508

50.177320
30.780021





Our philosophy

Healthcare, life sciences and pharma organizations are under constant pressure to keep pace with breakthroughs in technology and evolving customer expectations. Yet many aren't meeting those demands or maximizing the value of their customer relationship management (CRM) systems.

As companies reimagine the patient experience, a dynamic CRM foundation is essential to enable cohesive, personalized engagement. The task isn't just about connecting systems—it's about delivering insight-driven interactions that resonate at every point in the journey.

By partnering with ZS to implement Salesforce, organizations can unlock AI-powered, data-rich experiences from a single, unified platform—building meaningful, tailored connections across the healthcare life cycle.

“Our team at ZS has been focused for years on using Salesforce solutions to help clients transform their marketing offerings and digital customer experience.”

–Pratap Khedkar, ZS CEO

Table of Contents

Our philosophy	2	Case study 6:	14
Case study 1:	4	Omnichannel journey	enablement
Holistic Salesforce Marketing Cloud implementation			
Case study 2:	6	Case study 7:	16
Personalized touch point messaging improvement		Adaptable CRM solution	
Case study 3:	8	Case study 8:	18
Salesforce Marketing Cloud implementation and transition		Patient CRM implementation	
Case study 4:	10	Case study 9:	20
CRM implementation and process enhancement		CRM target refinement	
Case study 5:	12	About ZS	22
Patient journey transformation with Salesforce Data Cloud			



CASE STUDY 1

Holistic Salesforce Marketing Cloud implementation

An emerging pharma client builds target segments and launches marketing campaigns with Salesforce Marketing Cloud



THE CLIENT

An emerging pharma organization sought to improve customer targeting and campaign development

CHALLENGE

An emerging pharma company wanted to build target segments and launch automated marketing campaigns. It needed a partner to:

- Enable orchestrated multichannel customer experiences by implementing and integrating Salesforce Marketing Cloud
- Automate a personalized customer engagement strategy shaped by data, analytics and journeys

CASE STUDY 1

Holistic Salesforce Marketing Cloud implementation

APPROACH

ZS worked with the client to implement Salesforce. We:

- Conducted workshops with stakeholders to understand requirements, pain points and compliance guidelines
- Set up a cross-franchise cloud-based marketing automation platform with flexible and scalable integration capability
- Implemented Salesforce Journey Builder to automate email campaigns, allowing for timely and relevant communications based on user interactions such as welcome emails and surveys
- Used Salesforce Marketing Cloud's reporting tools to monitor campaign performance in real-time and automate daily reporting for marketing stakeholders

IMPACT

- **New marketing channels**

2+

Multichannel journeys launched from Salesforce Marketing Cloud to support the unbranded launch

- **Decision enhancement**

Enabled the marketing team to make data-driven decisions, optimizing campaigns based on real-time feedback

- **Improved email metrics**

30%

Increase in open rates

20%

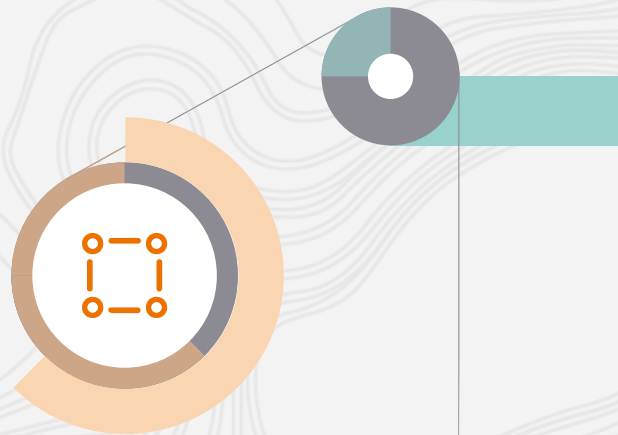
Increase in click-through rates

- **Increased value**

Scalable cloud-based platform that constantly delivers incremental value and enables analytics

CASE STUDY 2

Personalized touch point messaging improvement



An addiction treatment chain improves customer journey completion with optimized touch points



THE CLIENT

An addiction treatment provider sought to convert high-volume leads into customers

CHALLENGE

An addiction treatment provider wanted a higher conversion rate for leads and needed a partner to meet several challenges, including:

- A lead conversion system that combined the efforts of individual patient service reps and automated communications to convert leads into patients, causing bottlenecks
- Lower engagement and conversion rates for customers who began their journey by using the provider's website

CASE STUDY 2

Personalized touch point messaging improvement

APPROACH

ZS collaborated with the client to implement sensitive customer journeys to maximize benefits for the potential patient. The team:

- IT tested and reworked the automated rep emails to appear transactional rather than marketing-focused
- Implemented system-automated follow-ups to facilitate the reps' focus on getting customers the help they need
- Integrated multichannel systems to ensure they worked in sync to offer customers a consistent experience, no matter the channel

IMPACT

- **Improved conversion**

196%

Lift in email
click-through rates

14.7%

Average email open rates,
up from 5%

- **Enhanced experience**

Highly personalized, automated emails provided the same communication benefits without marketing appearance and felt like a natural continuation of chatbot conversations

CASE STUDY 3

Salesforce Marketing Cloud implementation and transition

A midsize pharma client reduces campaign deployment process time through Salesforce Marketing Cloud



THE CLIENT

A midsize pharma client sought to transition away from its existing automation platform and run campaigns without disruption

CHALLENGE

Our client, a midsize pharma organization, was looking to transition from their existing marketing automation platform to Salesforce Marketing Cloud. It needed a partner to:

- Implement Salesforce Marketing Cloud to enable additional channels and capabilities, including push notifications and web pages
- Transition current campaign processes and data to the new marketing automation tool, enabling disruption-free campaigns

CASE STUDY 3

Salesforce Marketing Cloud implementation and transition

APPROACH

ZS worked directly with the client to drive key transformation stages. We helped:

- Design a transition plan with no downtime and clearly defined roles and responsibilities
- Prioritize migrating ongoing campaigns to ensure no blackout periods
- Redesign current processes to eliminate redundant efforts and optimize the end-to-end campaign execution process
- Document key decisions and create new documentation for existing processes

IMPACT

- **Speed of implementation**

2 months

To deploy Salesforce Marketing Cloud best practices for healthcare providers and patients and migrate existing campaigns

- **No disruptions**

ZS created modular content for different email versions and launched the campaign without any blackout period

- **Campaign efficiency**

20%

Reduction in deployment time with an end-to-end campaign deployment process

CASE STUDY 4

CRM implementation and process enhancement

A medtech company streamlines a commercial launch with a tailored B2B CRM solution



THE CLIENT

A medtech company sought to engage key stakeholders more effectively and identify opportunities ahead of a medical device launch

CHALLENGE

A medtech company preparing to launch a new medical device needed to better engage key stakeholders. However, the sales team inefficiently used spreadsheets to track opportunities, causing delays. It needed a partner to:

- Collaborate directly with business and IT stakeholders to understand business requirements and the current ecosystem
- Design, build and deploy a CRM system personalized for the organization's needs

CASE STUDY 4

CRM implementation and
process enhancement

APPROACH

ZS worked directly with client stakeholders to develop and implement a personalized CRM system into the existing organizational structure. After setting up the initial infrastructure to ensure continuous feedback and improvement, ZS:

- Integrated external systems such as Komodo and Excel databases to synchronize data from existing databases into Salesforce and enabled integration into existing platforms, such as ZoomInfo and Outlook, and divided the release into intervals for easier development
- Customized CRM visibility and features, created and edited access for the operations team and tailored to records based on specific business needs
- Carried out consistent follow-ups and check-ins for feedback tracking

IMPACT

• **Seamless engagement****20%**

Reduction in admin activities, creating more time to drive customer engagement

• **Improved collaboration****30% - 40%**

Improvement in team collaboration through shared pipeline visibility and streamlined opportunity tracking

• **Accessible metrics****50% - 60%**

Reduction in reporting and approval time through enhanced data visibility and tracking

CASE STUDY 5

Patient journey transformation with Salesforce Health Cloud

A leading biotech organization elevates its patient support programs and transforms the end-to-end patient journey



THE CLIENT

A hospital system sought to expand CRM capabilities to access more detail for patients

CHALLENGE

Our client, a leading biotech company, struggled with disparate systems and processes in Asia-Pacific (APAC) markets. It needed a partner to:

- Improve consistency and harmonization across business processes in APAC markets, including China, Japan, Korea and Australia
- Design a patient experience North Star to guide service design, creation and implementation
- Harmonize siloed services and improve cross-country collaboration
- Consolidate services managed by third-party vendors

CASE STUDY 5

Patient journey transformation with Salesforce Health Cloud



APPROACH

ZS developed an extensive approach to improve consistency and harmonization, including:

- Conducting market research to understand common unmet customer needs and pain points across disease journeys
- Proposing a program vision and new organization structure to facilitate cultural change
- Creating a services blueprint and prioritizing services to deploy first in specific markets
- Developing a Salesforce Data Cloud-based tech backbone to integrate all services, starting with the first release
- Building secure data and analytics layers, enabling anonymized and tokenized data use for advanced insights such as patient-reported outcomes (PRO) and real-world evidence (RWE)

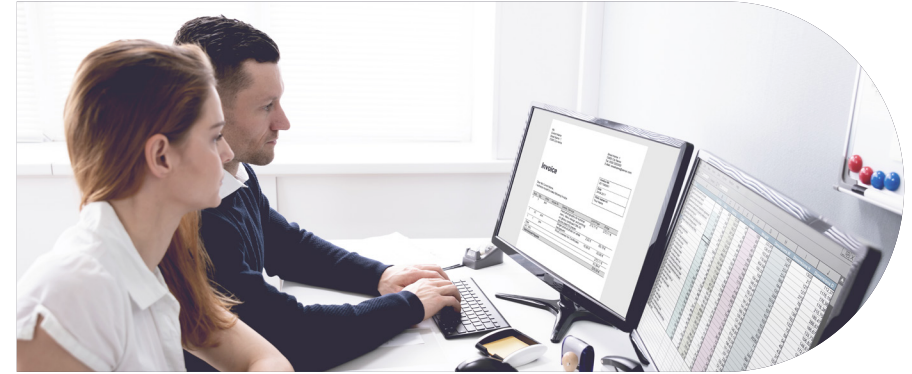
IMPACT

- **Industry differentiator**
Allowed the client to become the first pharma company to generate RWE and PROs through patient support programs data
- **Patient satisfaction**
Created a best-in-class customer experience program by covering end-to-end customer needs
- **Improved outcomes**
Elevated therapy effectiveness by improving adherence

CASE STUDY 6

Omnichannel journey enablement

A telemedicine company enhances omnichannel customer journeys through Salesforce Marketing Cloud and Salesforce Data Cloud



THE CLIENT

A North American telemedicine company sought to centralize marketing campaign execution platforms to enable more personalized omnichannel journeys

CHALLENGE

The client's marketing ecosystem serves 60 million customers with multiple platforms for audience segmentation that caused disintegrated customer journeys and complex workarounds. It needed a strategic partner to:

- **Implement Salesforce Customer Data Platform** to consolidate all data into one platform and enable easier use of data in marketing campaigns
- **Centralize data in Salesforce Marketing Cloud** to support stronger, more personalized omnichannel campaigns
- **Migrate 180 cross-channel campaigns**, including over 250 unique emails, more than 50 unique SMS messages, over 100 unique push messages and more than 10 unique in-app messages to Salesforce Marketing Cloud

CASE STUDY 6

Omnichannel journey enablement



APPROACH

ZS partnered with the client's CRM managers, engineering teams and other key stakeholders to design and build an implementation and migration blueprint. Our teams:

- Assessed the tech and data landscape to understand gaps and business rules around current marketing campaigns
- Designed a personalized customer data platform in Salesforce Data Cloud as an end-to-end solution architecture covering key integrations with Salesforce Marketing Cloud and existing marketing automation tools
- Created audience segments and calculated insights based on the aligned business rules to activate the user journey in Salesforce Marketing Cloud
- Designed and built a synchronous journey between the existing customer engagement tools and Salesforce Marketing Cloud to support the coexistence of SMS short-code on two platforms to support carrier-dependent migration
- Implemented a risk mitigation plan for the migration process and helped the client write SMS copy that aligns with best practices

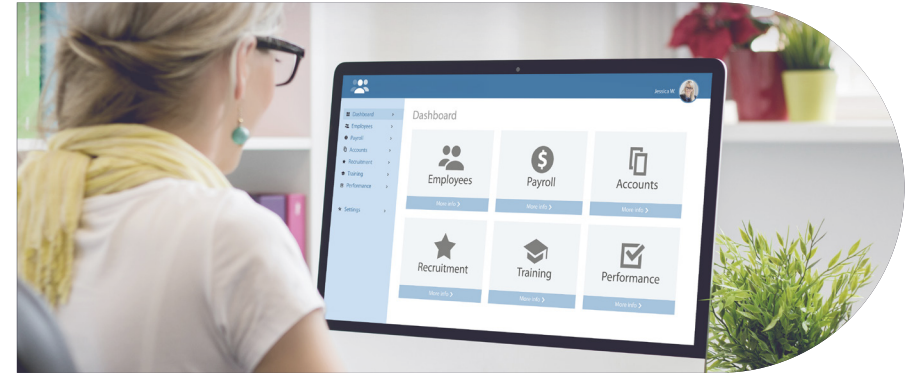
IMPACT

- **Seamless journeys**
Integrated omnichannel experience for end users
- **Real-time audience segmentation**
Supported more personalized customer engagement journey
- **Easy data access**
Uncovered real-time, meaningful insights for marketers

CASE STUDY 7

Adaptable CRM solution

A hospital system enhances its CRM usage to improve patient care and response



THE CLIENT

A hospital system sought to expand CRM capabilities to access more detail for their patients

CHALLENGE

The client used a Salesforce-based CRM, but usage was inflexible and inefficient. It needed a more adaptable solution to support diverse patient populations. Challenges included:

- **Lack of depth:** Clinicians struggled to capture comprehensive longitudinal data on critical aspects across different timeframes
- **Inefficient analysis:** A high reliance on manual data interpretation and lack of real-time visualization slowed decision-making and reduced responsiveness in patient care
- **Limited descriptors:** Options were limited to three form types that didn't meet the specific needs of youth and senior patient groups

CASE STUDY 7

Adaptable CRM solution



APPROACH

The project introduced a comprehensive, Salesforce CRM-based solution that streamlined patient data management. The solution involved:

- **Customized forms:** Two additional form versions were developed alongside enhancements to the existing forms
- **Structured data segmentation:** Data fields were organized to capture information across past, current and future categories
- **Automated data visualization:** The solution incorporated real-time data visualization tools within Salesforce
- **Enhanced collaboration:** Clinical teams were able to collaborate more effectively

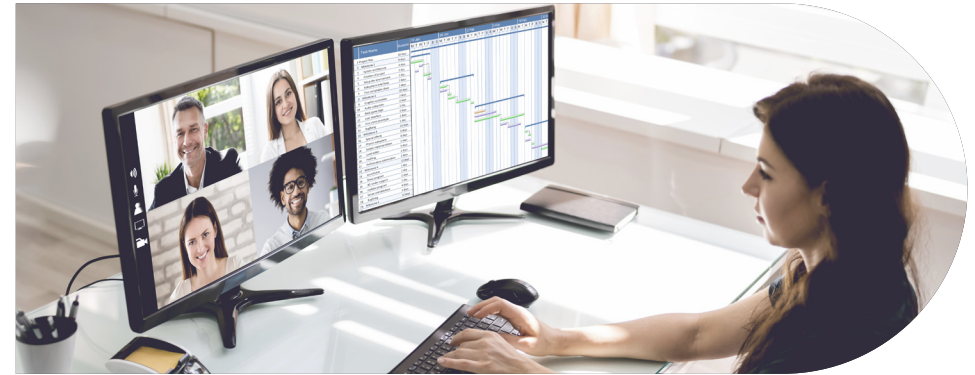
IMPACT

- **Improved data accuracy**
Specialized forms and visualizations reduced errors and improved data reliability
- **Real-time insights for proactive care**
Progress graphs empowered clinicians with immediate insights into patient risk factors
- **Operational efficiency**
Automated workflows and data visualizations within Salesforce reduced assessment time and supported a collaborative, patient-centered approach to care

CASE STUDY 8

Patient CRM implementation

A European pharma company improves user experience with a comprehensive patient CRM



THE CLIENT

A large pharma organization sought to improve patient support and enhancement with a patient CRM

CHALLENGE

A large European pharmaceutical company wanted a comprehensive patient CRM system to enhance patient support and engagement, address the needs of field clinical educators and access reimbursement teams. It needed a partner to:

- Develop a brand configurable CRM
- Design a data model scalable across all brands
- Train users on a staggered basis

CASE STUDY 8

Patient CRM implementation



APPROACH

ZS implemented a system to ensure the tool was comprehensively developed and implemented. ZS:

- Collaborated with the client to ensure industry best practices for design and coding
- Worked closely with end users and received positive feedback, especially on intuitiveness and ease of navigation
- Conducted sprint demos with training feedback triaged to allow quick turn-around during user acceptance testing (UAT)
- Trained approximately 25 super-users prior to UAT to improve product functionality and adoption

IMPACT

- **Seamless integration**
Created a one-stop shop for reimbursement and access specialists, clinical educators and marketing teams with almost everything users needed in day-to-day life
- **Enhanced usability**
Connected and intuitive patient experience with the integration of multiple internal and external applications
- **Global usage**
Designed a data model that's scalable across brands and regions

CASE STUDY 9

CRM target refinement

A specialty pharmacy organization transforms its Salesforce target refinement process to make it highly dynamic and agile



THE CLIENT

A pharma organization sought to enhance in-house options for target refinement using Salesforce

CHALLENGE

Our client wanted to explore in-house options for target refinement to reduce costs and make the process more dynamic and agile. It needed a partner to solve:

- **Process isolation:** Target refinement operated separately from the CRM system, requiring extra effort and creating inefficiencies
- **Cost and dependencies:** Reliance on an external tool increased costs and required support teams for adjustments, limiting agility and autonomy
- **Limited agility:** The annual refinement cycle allowed only a brief update window, causing delays and reliance on offline tracking that led to potential data inaccuracies
- **Lack of visibility and coordination issues:** Sales reps lacked transparency during refinement

CASE STUDY 9

CRM target refinement

APPROACH

ZS implemented a comprehensive target refinement solution directly on the client's existing Salesforce CRM platform, making the process more agile and efficient. This included:

- **Collaboration and agile approach:** ZS worked closely with the client's Salesforce and testing teams to document requirements, implement changes and gather feedback from different user groups
- **Automation and streamlined approvals:** The new system automated target refinement requests, incorporating multilevel approvals based on healthcare provider specialty and ZIP-territory alignment
- **Enhanced transparency and reporting:** The solution provided Salesforce-based reports for sales reps, managers and home office users to track target changes
- **ZIP-territory alignment automation:** ZS automated the previously manual and Excel-based ZIP-territory alignment process, reducing errors and streamlining data integration

IMPACT

- **Seamless CRM integration**
The target refinement application was deployed within the existing CRM, minimizing disruptions and maximizing efficiency
- **Real-time target updates**
Users can now refine targets throughout the year, enabling timely updates and leveraging real-time insights for better performance
- **Cost-effective solution**
By utilizing native Salesforce capabilities, the solution avoided additional platform costs and optimized resource allocation



About ZS

ZS is a management consulting and technology firm that partners with companies to improve life and how we live it. We transform ideas into impact by bringing together data, science, technology and human ingenuity to deliver better outcomes for all. Founded in 1983, ZS has more than 13,000 employees in over 35 offices worldwide. To learn more, visit www.zs.com or contact us [here](#).



About our Salesforce partnership

With the power of Salesforce, ZS helps organizations accelerate go-to-market strategies, optimize operational costs and transform the digital customer experience. ZS is an Agentforce Partner, working with clients to leverage the combination of existing agents in Agentforce, Salesforce Data Cloud, partner agents and custom-built agents. ZS is also an Alliance Migration Partner, a coalition of worldwide agencies and consulting partners that guide customers through a seamless transition to Salesforce Life Sciences Cloud, while maintaining backward compatibility.