



# Syncsite Writes Prescription for Success for Potter's House Apothecary

## CHALLENGE

Potter's House Apothecary was expanding into new lines of business and its old system of paper marketing logs was no longer adequate to support that growth.

## SOLUTION

Potter's House Apothecary selected Syncsite to implement Infor CRM and CompoundRM, a solution developed specifically for compounding pharmacies.

## RESULTS

Reps now have access to all details of their accounts from their mobile devices. Geotagging upon check in validates each visit. Data analysis tools uncover new opportunities and trends. Service levels have improved through comprehensive issue tracking.



- **Client**  
Potter's House Apothecary
- **Industry**  
Compounding Pharmacy
- **Headquarters**  
Peoria, Arizona
- **System**  
Infor CRM™, CompoundRM  
Advanced Analytics

Potter's House Apothecary is a successful compounding pharmacy serving customers across the state of Arizona. Founded just six years ago, Potter's House Apothecary has quickly grown into something of an industry model, with revenues exceeding that of its peers, and its personnel invited to speak nationally at industry conferences. The company does many things right, including investing in the marketing automation tools that drive new opportunities and help build strong, healthy relationships. For Potter's House Apothecary, those tools include Infor CRM, CompoundRM and Advanced Analytics from Syncsite.

## POSITIONED FOR GROWTH

"We learned about Syncsite and CompoundRM from an industry colleague," recalls Amber Swaney, Director of Sales and Marketing for Potter's House Apothecary. "We were taking on a new line of business and the paper marketing log system we had been limping along with simply wasn't going to support that growth." CompoundRM, developed by Syncsite, is a solution created expressly for compounding pharmacies that leverages the Infor CRM platform. "Regular Customer Relationship Management (CRM) software could get us close to what we needed, but it just doesn't accommodate the unique aspects of our business and how

our sales representatives operate in the community," explains Swaney. "CompoundRM was built for this industry and it works the way we work. It is very powerful and very flexible." Swaney has similar praise for the company behind the solution. "Syncsite has been great to work with. The whole team there is responsive and knowledgeable. We feel like they are vested in our success and are always there to help."

## POWERFUL RELATIONSHIP BUILDING TOOL

Today, the company's mobile sales force is equipped with iPhones® and iPads® running CompoundRM. With access to all the practices and doctors in their territory, CompoundRM helps them plan their daily routes and select the locations they need to visit. Swaney says that the reps love the tool, as it gives them complete access to all the details of each of their accounts, so they can enter a doctor's site prepared, informed and equipped to help. Following each visit, the reps record notes, expenses, and schedule follow-up visits through CompoundRM.

## BOOST SERVICE LEVELS

As a service-oriented organization, the Ticket feature in the software has proven to be especially valuable for the Potter's House Apothecary. "We'll create a ticket

# Syncsite Writes Prescription for Success for Potter's House Apothecary (continued)

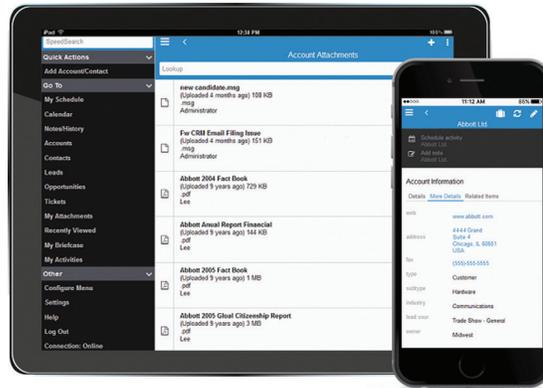
## POTTER'S HOUSE

"We're seeing tremendous success that we can directly attribute to Infor CRM and CompoundRM." Amber Swaney, Director of Sales and Marketing

## MORE

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any time there is confusion about a prescription, a specific concern on our part or clarification we may need from the doctor or patient," explains Swaney. "Outstanding tickets are immediately available on the reps' mobile devices, so they can work toward resolution. Flags alert us if a ticket has been open too long, so we can better stay on top of things. We feel this feature has dramatically improved the level and speed of service we can offer our doctors and their patients."



## ACCESS TO STRATEGIC DECISION MAKING DATA

Management relies on CompoundRM to provide a high level of visibility into the activities and travels of the company's sales representatives. "We work with the reps to set up an appropriate level of visit frequency for each doctor, and we store that frequency in the software," explains Swaney. "Both the reps and I can then ensure that the reps are honoring that visit schedule. As they check in from the doctor's location, geotagging captures their actual location so there's no room for error." Using integrated business intelligence and reporting tools, Potter's

House Apothecary is able to create queries combining its own data and data obtained from IMS Health. "This is really powerful," says Swaney. "The IMS Health data has contact information for all 30,000 physicians in Arizona. Adding that information to our own growing database gives us a tremendous advantage."

## INDISPENSABLE SOLUTION

The solution has been a big win for Potter's House Apothecary, allowing the company to best manage the sometimes complex relationships between doctors, clinics, patients and insurance companies. Swaney says the company is now mining the data to find the best ways to engage physicians by analyzing trend by specialty, practice size and more. "We are collecting a tremendous amount of data and are just beginning to scratch the surface of using that data to our best advantage. Syncsite has been very helpful in building new queries for us, and in teaching us how to maximize the value of the solution." "Our decision to engage Syncsite and implement Infor CRM and CompoundRM represented a big investment for our growing company," concludes Swaney. "But we've never once looked back. We now consider it indispensable. We're seeing tremendous success that we can directly attribute to Infor CRM and CompoundRM."

## 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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