

PCI PHARMA SERVICES – SALES QUOTE IMPORT ROUTINE



INDUSTRY



HEALTHCARE &
LIFE SCIENCES

BUSINESS SIZE

6000+ EMPLOYEES
15 GLOBAL SITES
\$1BN+ REVENUE

PRODUCTS USED

- SALES CLOUD
- SERVICE CLOUD
- PLATFORM
- TABLEAU
- EXPERIENCE CLOUD
- INBOX

OVERVIEW

PCI Pharma Services is a global, integrated Contract Development & Manufacturing Organisation (CDMO) delivering a comprehensive range of pharmaceutical services from the earliest stages of development through to commercial launch and beyond.

SITUATION

The company's strategy has been to grow through acquisition, which while highly successful, has presented challenges as new businesses coming on board often had different methods and protocols for generating quotes – and different requirements.

For example, while the Clinical Division quotes for very specific, relatively short-term projects, the Commercial Division has to factor in costing for projects that might have a lifespan of five years or more. Given that the company could be sending out upwards of 40 proposals a week, members of PCI's senior team were determined to harness opportunities to streamline the process for all, using the company-wide Salesforce Customer Relationship Management (CRM) system.

SOLUTION

Business Development Operations Specialist at PCI, Luke Paton, wanted a bespoke Sales Quote Import Routine within Salesforce that would not only accommodate these different needs, but could also link to other elements within the system such as the Compound Library Database (another specially tailored element within Salesforce).

He called on the team at Mint to work with him to create a new Request for Quote (RFQ) 'flow', a series of question prompts to enable users to input necessary information (such as formulation and packaging requirements) in a consistent way. They are also able to bulk load relevant elements via a CSV file, rather than having to input detail line by line. Given that up to 50 separate lines might be involved, this was a huge time-saver, and Mint also built in an automatic check that would flag up discrepancies such as missing information which could be added without having to rework and reload the CSV file.

The adapted Salesforce software also offers the ability to model various aspects such as predicted costs for different timeframes – particularly valuable to the Commercial Division.

Luke explained: 'It was about creating a natural 'journey' through the system for our business development people, so that we could gather as much information as possible across the company – in a format that we could all use, not only for the quotes themselves, but for wider business planning purposes.'

 RESULTS

Users across all areas of the business can now generate quotations in Salesforce far more quickly and PCI has a more granular level of line-item detail. For example, instead of just having a line for 'Primary Packaging' they can now call out the line specifics (such as carton etc.) as these will have been automatically loaded using the new tool. This offers wider forecasting and planning information – invaluable to the management team - in addition to the time saving element.

Luke said: 'The project with Mint helped us to do a mass update of data and harmonise our whole approach to quoting across all our sites. I found the team extremely responsive – they never told us something couldn't be done - and came with excellent solutions that I can now tailor even more as we use the system over time.'



"Mint were extremely responsive and never told us something couldn't be done!"

LUKE PATON
GLOBAL BD OPERATIONS SPECIALIST