



# Axis Global Partners Implements Sage CRM for Organ Recovery Systems Enhancing Customer Visibility and Tracking

## SUCCESS STORY

**Industry:**  
Medical Device

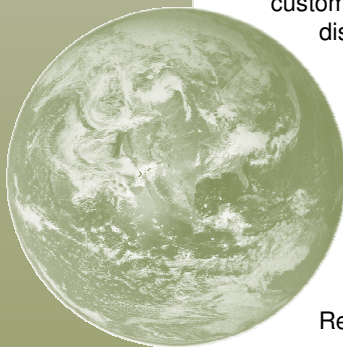
**Company:**  
Organ Recovery Systems, Inc.  
www.organ-recovery.com

**Opportunity:**  
Operating on three continents and with customers all over the world, Organ Recovery Systems needed a more centralized location to house all of their customer information.

**Solution:**  
Axis Global Partners implemented Sage CRM, customized it to fit the unique requirements of Organ Recovery Systems, and successfully trained staff members across their organization.

**Results:**  
Organ Recovery Systems is now able to track customer information, interactions, and help-line calls; as well as identify recurring issues signaling the need for additional training.

**System:**  
Sage CRM  
Sage 300 ERP  
Pacific Technologies Purchasing Workflow  
Orchid Process Scheduler & Information Manager  
Wellspring PrintBoss  
ClickBase Business Intelligence



Organ Recovery Systems is perhaps best known for their development of the LifePort Kidney Transporter, a product that reduces the risk of Delayed Graft Function (DGF) and the associated risk of transplant failure. LifePort technology has been proven to enhance the potential for kidney transplants, allowing them to function sooner and last longer. In a recent study published in *The New England Journal of Medicine*, it was discovered that kidneys transported with LifePort have a significantly higher 3-year graft survival rate than those stored in a traditional box of ice. Through providing innovative products for organ preservation, evaluation and recovery, Organ Recovery Systems is improving the quality of life for transplant patients around the world.

### Fragmented Customer Information Leads to a Lack of Insight

Supporting more than 100 transplant programs in 17 countries, and with staff members spread across three continents, Organ Recovery Systems' management recognized their need for a company-wide Customer Relationship Management (CRM) system. With all non-accounting customer-related data maintained individually by their sales reps, it was extremely difficult to get a global view of their customers at any given time.

One specific area of importance was maintaining accurate and timely customer training records. Matthew Copithorne, General Manager, Sales & Marketing for Organ Recovery Systems explains, "We pride ourselves in our customized training programs, and this differentiates us within the industry. We spend a lot of time identifying the individual needs of our customers in order to help them use our products to their fullest potential. However it felt as though our efforts were marginalized when our trainers had no definitive way to identify previous training for a customer prior to meeting with them to discuss their next steps."

Organ Recovery Systems needed to keep track of other customer information as well including products purchased, previous training records and questions the customer had asked. By recording individual questions and interactions Organ Recovery Systems felt they would be



better able to recognize common themes which would in turn enable them to address any notable issues on a larger scale. Further, a centralized database of customer information would allow them to provide more streamlined communication amongst the Organ Recovery Systems' staff and with external contacts using e-blasts and newsletters.

### Axis Global Partners plus the Right Technology Equals the Formula for Success

After making the decision to implement a CRM system, Organ Recovery Systems reached out to their trusted advisors at Axis Global Partners. Having previously worked with Axis to implement Sage 300 ERP (formerly known as Sage ERP Accpac) and ClickBase Business Intelligence, the decision to utilize their expertise once again was easy. Matthew recalls, "It was a natural choice for us because Axis continuously provides great service. We know we can trust that they always have our best interests in mind. They seek to ensure that any product they offer, and customization they perform will meet our needs. To this day they follow up with us regarding our technology asking whether it is working as a *tool* and not a *task*." Tony Chiodo, Partner at Axis Global Partners adds, "We were very happy to be able to assist Organ Recovery Systems with a new CRM application. We enjoy working with them because they are great people, and it feels good to know that they trust us enough to continue to engage us for assistance".

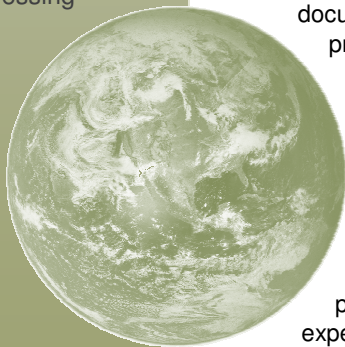
The first step was to identify and define the goals of the project. In addition to the challenges that led Organ Recovery Systems to their initial decision for CRM, there were



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**Axis Global Partners** is a team of certified business consultants serving small to mid-sized businesses throughout the United States, Canada, Latin America and the Caribbean. We improve our clients’ top and bottom lines with automation solutions that increase profits, decrease costs and pay for themselves in the shortest period of time possible.

Our company is led by industry experts specializing in business processes and solutions. We brainstorm all possible improvements to fit your business needs and close the gap between potential and actual performance. We inspire trust by taking responsibility, acting ethically and encouraging honest and open discussion while focusing on your most pressing challenges to deliver innovative and effective solutions.



several other needs including redefining opportunities and tracking all of their contact’s multiple associations and interactions. Tony explains, “Organ Recovery Systems’ business is very unique because one individual may have multiple roles within different organizations that need to be tracked individually and jointly. For example, a doctor may serve on multiple boards and work at various hospitals and each association needed to be tracked separately however viewing this from as a whole was important to get a global view of the relationship.”

Once the objectives were established, Axis Global Partners implemented Sage CRM and customized it to best meet Organ Recovery Systems specific requirements. “Axis represents a very good product in Sage CRM,” mentions Matthew. “However they make it a *great* tool because they understand how you want to use it. Because CRM systems are customizable you have the ability to go in any direction you want, and they were able to tailor it to our needs and our budget.”

Axis trained Organ Recovery Systems’ staff in the United States, Europe, and Brazil. “The educational challenge Axis faced was significant due to our multiple locations across the globe,” reflects Matthew. “The way they centralized our learning with a systematic and tailored approach was very impressive.” Axis implemented a user-centric learning technique to encourage users to embrace the new system. Tony explains, “Oftentimes it is necessary to provide two phases of knowledge transfer. It is important to first build a foundation of knowledge throughout an organization, and then take it to a more personalized and individual level. We sat down one-on-one with each staff member and went over their day-to-day processes talking about the functions that were performed the previous week and then checked to see if it was documented in CRM. By using this process we were able to identify the “learning gaps” and leverage our time to work on the procedures being missed and more importantly why. We focused on their challenges and questions and conducted online sessions so their peers could observe and learn as well. This provided the optimum learning experience allowing more staff to see

how to use the system, greatly improving user adoption.

**Revitalized Customer Data Management Leads to Success**

Organ Recovery Systems is happy to report that they have reached all of their intermediary goals. From tracking help-line calls; viewing previous and scheduled training by customer; and sending out regular newsletters and email communications, they couldn’t be happier. The new CRM System has allowed Organ Recovery Systems to bring marketing efforts in house, saving marketing budget dollars. Luanne Rodgers, Vice President, Sales & Marketing for Organ Recovery Systems comments, “Axis provided an educated perspective as to what our long term needs would be and how we could utilize Sage CRM to obtain the visibility and efficiency we needed. Having a centralized location for our data has significantly improved our ability to optimize the use of our sales teams’ time and effort so we can remain competitive, and provide superior service.”

Matthew praises the Axis team, “We went in with a pretty tight budget, and Axis was able to help us identify our wants and needs, and then narrow that down even further into *critical* wants and needs. This allowed us to end up with a robust product that serves our requirements today and gives us the ability to grow and change in the future.” Lisa Kieres, CFO for Organ Recovery Systems comments, “I am consistently impressed with Axis. They not only understand what we need from a software standpoint, but also understand how to use these great tools to streamline our business processes, and provide invaluable management information to our team. They have guided our company in the purchase and installation of our ERP, Business Intelligence and CRM systems and have worked alongside our team to refine our processes making us more efficient and profitable. I don’t know how we would run our business without these tools and their assistance. They truly are a one of a kind advisor.”

Tony concludes, “The great thing about CRM is its far-reaching functionality...once you get into it you can find more and more ways to improve the flow of information throughout your business. It is a piece of technology that will continuously provide a return on investment as you move forward.”