

# KEY SURGICAL

MINNEAPOLIS, MN | KEYSURGICAL.COM

## The Company

Key Surgical is a Minneapolis, Minnesota-based manufacturer and distributor of sterile processing and operating room supplies. They provide products to hospitals, surgical centers, and more throughout the U.S. and internationally. The company, in operation for more than 28 years, has 3,000+ products in its portfolio.

## The Challenge

Hospital operating rooms and sterile processing departments demand “easy.” Not only do they need a one-stop supplier with broad product inventory capabilities, they need a supplier agile enough to process and ship the order that same day. It’s a high-volume, high-velocity business. Key Surgical promises that domestic orders placed before 4:30 PM CST will ship that same day — no small feat considering that, on average, the company receives hundreds of orders per day.

For over twenty years, Key Surgical used Microsoft Dynamics GP as its sales order processing platform. Despite the solution’s traditional accounting and financial reporting strengths, it proved unwieldy for sales order processing. Customer interactions were bogged down as staff navigated multiple screens and pop-ups to locate customer histories, pricing, billing and shipping information, and inventory availability. Handling multiple customer calls simultaneously was virtually impossible.



Executives, line-of-business managers, sales representatives, and marketing staff struggled to access actionable transaction and inventory data using the Dynamics GP interface. The ability to analyze trends, monitor individual customer activity, and track product performance and inventory was compromised across the entire organization.

## The Solution

CAVALLO SALESPAD. “We’re always looking for a ‘one plus one equals three’ scenario, and SalesPad gives us that by significantly improving Dynamics GP’s ease of use for sales order processing,” Herda says. With SalesPad added to their on-premises order-to-cash cycle strategy, they were able to extend the life of Dynamics GP significantly.

## Best-in-class solution for sales order processing

Key Surgical leverages SalesPad's standard dashboard capabilities, configuring it to display all relevant order processing data. They can now easily query and track real-time and historical sales metrics such as order volume, dollars per order, orders by sales rep, orders by customer, or returns. Visibility into such information is critical for the company's executive and financial leadership, as well as for individual sales reps, who access sales data to plan and execute customer sales strategies based on order patterns and trends.

In addition to SalesPad, Key Surgical deploys SalesPad's FedEx Ship Manager Connector and UPS WorldShip Connector to provide a bridge between its Dynamics GP system and third-party shipping software programs, such as those used by UPS and FedEx. These connectors automate, monitor, and streamline shipping workflows while housing all relevant shipping data, including tracking numbers, shipping costs, invoices, and sales orders.

## Customer, performance, and management insights at a granular level

Herda uses the term "transactional elegance" when describing the sophistication of SalesPad-enabled sales order processing. The employees of Key Surgical found that the one-click navigation streamlines their customer interactions and enables their order entry staff to efficiently process multiple orders concurrently. Their newly-standardized workflows eliminate the complexities of managing credit issues and international shipments.

SalesPad's dashboards and sales monitors are equally critical to the employees at Key Surgical, but on a strategic level. "Our owners have SalesPad open 24/7, monitoring performance. That's serious power,

especially considering they come from Fortune 500 company backgrounds, where getting their arms around real-time transactional sales data was imperative."

Key stakeholders in marketing, management, and sales use that easy information access to not only see at a glance how they're doing at a moment in time, but to analyze historical data as well.

"Sales reps can see what a customer is ordering, when they last ordered, and what kind of samples they sent out," says Herda, while emphasizing that SalesPad is more than a tool for looking to the past. "Our marketing department uses the data they access through SalesPad to monitor sales and trends, for instance, to assist in developing advertising and track how a given product is selling in certain geographies. Getting such a granular view of our customers was possible with GP, but SalesPad makes it so much easier."

The ability to monitor product demand helps Key Surgical ensure those products are readily available. They're now confident in their restocking strategy, using past trends to hone what used to be a cumbersome task into a fool-proof process — all while avoiding either running out of inventory or being stuck with too much of it.

"We use SalesPad to support [our] supply chain in prevention of out-of-stock situations when possible, enabling us to maintain an incredibly high fulfillment rate, because we get better information on back-orders. We're able to react to trends and customer preferences, all of which makes us more agile, flexible, and makes us easy to do business with."

"We're always looking for a 'one plus one equals three' scenario, and SalesPad gives us that by significantly improving Dynamics GP's ease of use for sales order processing."

Ralph Herda, CFO

