



Case Study – Health Care

## AB Orthodontics



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**Andrew Binns**  
Managing Director of  
AB Orthodontics

### AB Orthodontics Straightens Business with GoldMine

AB Orthodontics is a Melbourne-based supplier of orthodontic products, such as braces, mouthguards and hand instruments, to orthodontists throughout Australia and New Zealand.

It is also master distributor for an Australian brand of stainless steel orthodontic wire, which it sells domestically and exports to countries throughout Asia Pacific and South America.

### CHALLENGES

With three field-force sales people managing territories covering the whole of Australia, AB Orthodontics faced a challenge managing increased reporting and communications between the sales staff and head office.

As Andrew Binns, Managing Director of AB Orthodontics, explains, “Having staff located remotely makes it hard for any sales manager to maintain a thorough dialogue or relationship where each person feels the lines of communication are both open and easily accessible. Generally, the better the technology you have, the easier it is to maintain [a good relationship].”

AB Orthodontics’ sales people submit daily client reports from the field, which record detailed notes from sales appointments. Until recently, these reports were Microsoft Excel spreadsheet-based, resulting in a “large accumulation” of spreadsheets at head office.

“We found spreadsheets to be a cumbersome way to submit reports. For example, there was a spreadsheet to track the customer sales call cycle in each territory, but it was so difficult to manage that we couldn’t really see how the sales people were planning for their territories. The manual nature of the reports also meant that daily reports were being filed only some of the time,” explained Mr. Binns.

### SOLUTION

AB Orthodontics selected GoldMine customer relationship management (CRM) to address their challenges.

“A colleague of mine discovered GoldMine and suggested we take a look at it. After doing so I was completely sold on it being the obvious way to go forward. We also didn’t need to evaluate additional products because my colleague had also gone through that process,” explained Mr. Binns.

AB Orthodontics implemented the solution with assistance from a systems integrator. It is also currently using FrontRange accredited partner, Forward Thinking Consulting Services, to enable the company to better utilise the full range of features in GoldMine.

“We haven’t had one day of downtime with the system in over three years. It is very robust and bulletproof, and rarely needs to be tweaked,” said Mr. Binns. “We also like the easy-to-use interface, such as the colourcoding, which enables quick referencing of information to be made.”

## RESULTS

Since implementing GoldMine, AB Orthodontics has seen a marked improvement in communication levels between sales and administrative staff.

“A lot of clients call the office directly for information about a product or to place an order between meetings with the sales people. With GoldMine, the sales people can synchronise in the field and gain access to the notes administrative staff have made, so the next time they visit the client they can seamlessly continue to dialogue,” explained Mr. Binns.

The integrated calendar streamlined forward planning for each sales territory. In addition, the level of information captured by GoldMine means statistical analysis on the details can now be performed.

“From a management perspective, we can now see how many appointments are completed by a sales person within a specified date range. Each sales person can also see how many appointments the other is making, so there is a competitive and motivational aspect to it, but within boundaries as the system also sets out what is a reasonable target so things can’t get out of hand,” said Mr. Binns.

The level of detail available means that achievements or problems can be recognised as early as possible.

“I read the notes from the sales people each night, so if there is anything commendable I can more easily congratulate them on their achievements,” said Mr. Binns.

Payback on the solution was “pretty instant”, claimed Mr. Binns. “Frankly we had X dollars’ worth of frustration with previous methods, but we only realised this once we’d achieved efficiencies and improvements with GoldMine. It has bought me a lot of peace of mind,” Mr. Binns added.

AB Orthodontics now views GoldMine as central to managing internal and external relationships in the business. “It’s been a huge victory for us. We’d be lost without it – almost to the point that we couldn’t have a fully functional sales team or adequate sales management without GoldMine,” added Mr. Binns.