

# Parata Systems Leverages Siebel CRM to Streamline Operational Processes

## CRM project profile



### Internal Systems Struggle to Keep up With Growing Company

Parata Systems, LLC is an industry leader and pioneer in pharmacy automation solutions that improve consumer safety and convenience. In 2006, Parata acquired the assets of the Automated Prescription Systems business unit from McKesson Corp and entered into a long-term strategic alliance, under which McKesson became the sole third-party distributor for all Parata products in North America as well as a significant minority investor in Parata. As the company grew, internal processes became more loosely defined and subsequently were not working as desired. Critical interfaces, automations and processes were expanded across a broader spectrum of functional areas – sales & marketing, customer care call center, field service, service orders, and contracts. Parata needed a CRM solution that could accommodate highly-specific functionality across diverse organizations within the company.

**Industry:** High Tech

**Oracle Applications:**  
Siebel CRM 8.0

### Success Metrics:

- Streamlined sales process
- Enabled expanded marketing programs
- Replaced home-grown solutions that couldn't scale
- Simplified total number of integration touch points
- Simplified process to for ordering trunk and non-trunk service parts
- Improved call center visibility to service order status

### Siebel CRM to Address Specific Functionality Requirements

Parata selected eVerge Group to implement Siebel CRM 8.0 application that employed the following major objects: Accounts, Addresses, Contacts, Opportunities, Quotes, Sales Orders, Service Orders, Products / Pricing, Forecasting, Invoicing, Contracts, Assets, and Service Requests. Interfaces included Great Plains (Customers, Orders, Parts), customer portals, internal engineering applications, and external HIPAA databases.

### Client Feedback:

*"Multiple major projects were occurring simultaneously. eVerge Group provided timely guidance and expertise that was needed to successfully manage scope, expectations, and delivery of the conversion of our CRM system."*

**Eric Clay**, Director of MIS,  
Parata Systems

The implementation entailed migrating business processes, data interfaces, and historical data from their previous CRM application to Siebel CRM On Premise. The project was complex due to the number of custom applications and automated jobs that had been built onto their previous system. These customizations were critical to the support of Parata's operations. In the spring of 2008, the system was deployed across a base of 250 users.

### CRM System Streamlines Operational Processes

The system has streamlined Parata's opportunity-to-quote sales process and improved its call center's visibility of service order status. It has also enabled them to expand marketing programs. Because the system replaced numerous home-grown applications that could not scale, it has reduced the number of integration touch points and simplified operational processes. eVerge Group continues to provide Parata with application advice and future scoping recommendations.



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