

CASE STUDY

# ARxIUM prescribes efficiency with Salesforce and TrueContext



## POSITIVE BUSINESS OUTCOMES

- ✓ Improved CSAT based on faster follow-up
- ✓ Achieved 100% digital workflows
- ✓ Identified revenue opportunities to expand service offerings

# The Challenge

ARxIUM is an industry-leading provider of innovative pharmacy automation solutions with international headquarters in Canada and the United States. They produce automated dispensing cabinets, high volume filling, and IV rooms for pharmacies, clinics and hospitals with patient care front-and-center.

Despite their innovative tech solutions, ARxIUM had a problem with work documentation and transferring crucial inspection data to client operations. Their field technicians relied heavily on paper forms to complete everything from site surveys to preventative maintenance, and it severely impacted their deliverables and customer satisfaction.

For example, site surveys meant to gauge electrical power, door dimensions, and point of delivery for smooth equipment delivery were arriving after the product was shipped or delivered—rendering the paperwork completed by the technician useless. If the form did arrive on time, it often included illegible handwriting or was scanned and emailed with missing or incomplete pages. This resulted in costly wait times and heavy opportunity costs for technicians caught in the delay.

Clunky coordination and training challenges resulted in inconsistent documentation practices about what work was performed, when, and by whom.

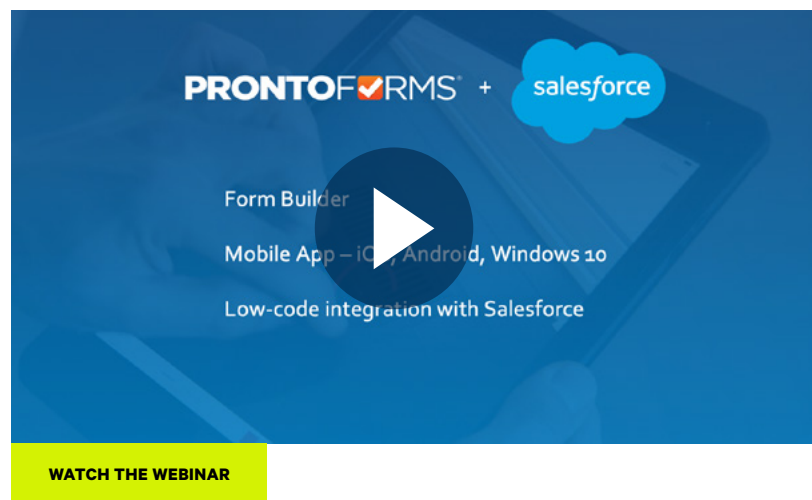
# The Solution

ARxIUM already used Salesforce Service Cloud and Google Sheets and needed a solution that would not only solve their paper problem but also update asset service records in real-time and improve customer satisfaction.

It was a big order. One that, after researching, ARxIUM decided TrueContext could fill because of its robust integrations.

ARxIUM built survey workflows for technicians' smartphones and tablets through the TrueContext app. Now critical data such as software versions of maintained equipment instantly populates corresponding asset records in Salesforce, while part numbers and descriptions are pulled from a data source Google Sheet. Once the form is completed, a formatted PDF report is sent directly to the customer's administrative department with a case number for reference.

The deployment was released in two controlled phases, complete with feedback cycles with field technicians to polish form design and flow. The resulting solution was then released company wide.



The image is a blue rectangular graphic with a white play button icon in the center. At the top left, it says "PRONTOFORMS" with a checkmark icon, followed by a plus sign and the "salesforce" logo. Below the play button, the text reads: "Form Builder", "Mobile App - iOS, Android, Windows 10", and "Low-code integration with Salesforce". At the bottom left, there is a yellow button with the text "WATCH THE WEBINAR".

“Results were very positive and nobody experienced issues, whether logging into the app or completing the forms,” says Jodie Menard, Director of Customer Care at ARxIUM. TrueContext’s intuitive platform leverages familiarity with mobile devices, so technicians were able to pick up the app and use it within minutes, without training or a lengthy onboarding process.

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## The Benefits

The results are extensive and far-reaching. The most immediate, tangible results came from the improvement of form submissions. Site survey forms arrive at their routed destinations in real-time, with contextual images before assets arrive on site.

The preventative maintenance checklist likewise is overhauled to include customer signatures, allowing customers to approve the work completed. The completed document further routes to Salesforce which allows ARxIUM to track when the form was completed and include conditional formatting to identify areas of concern discovered during the checklist.

Ultimately, these improved workflows meant a marked increase in customer satisfaction. Customers not only have access to transparent records of services performed but no longer needed to contact ARxIUM for information because they personally signed-off on the work.

Other improvements to ARxIUM include time saved during form completion—from one hour to real-time—and removing the need to hunt down missing information or enter data manually. This freed time allows both back-end and field service teams to focus on delivering quality products and service.

Finally, collaboration with TrueContext shaped the success of ARxIUM's deployment. "We were successful mainly because of the information and the guidance we were receiving from the TrueContext team," says Menard.

From this point, the foundation of ARxIUM's digital transformation has been laid in a way that enables future growth. The ARxIUM team is already taking on a wave of requests from other service teams that need to reduce repetitive work in the field.



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*We honestly didn't think we'd be able to cut 50 minutes out of the service time. We would've been happy if we could cut it by half, say 30 minutes, but the end result ended up being more.*

**JODIE MENARD**  
DIRECTOR OF CUSTOMER CARE  
ARXIUUM

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