

CASE STUDY

# Helapet



“Our business has seen a double-digit growth for both 2018 and 2019, which sales-i has certainly contributed to.”

Tony Phelps  
Sales and Marketing Manager



Helapet is a manufacturer and distributor of medical and cleanroom consumables, serving core markets such as hospital pharmacy, pharmaceutical manufacturing, laboratory, and veterinary environments.

Established in 1984, Helapet has been delivering high-quality sterile and non-sterile products for almost 40 years, to support critical environment activities across all areas of aseptic manufacturing and healthcare provision.

## The Challenge

The healthcare industry is incredibly fast-paced, but with hundreds and thousands of different products, it's a competitive and crammed market.

Helapet quickly recognised that their catalogue of medical products needed to be properly monitored and tracked in order to identify changes in customer buying patterns. With several hundreds – running into thousands – of ledger accounts, delivery points and individual product codes, it wasn't a straight-forward and simple task.

Tony Phelps, Sales and Marketing Manager at Helapet shares: “We have a large number of relatively small value accounts and monitoring order patterns and changes in these together, with prioritising which accounts are more urgent to visit, has been an issue historically.”

“Our Account Managers were completing their monthly reports on Excel and Word, which was not time efficient or effective. This data couldn't be captured on our back-office system. There was no way of searching history, no way of identifying a specific piece of information; it was hugely time consuming.”



**1984**  
ESTABLISHED FOR  
OVER 30 YEARS



**12%**  
GROWTH IN 2018



**31.3%**  
INCREASE IN NEW  
BUSINESS PIPELINE

# Helapet use sales-i to close more deals and reach their targets.



31 employees



9 sales-i users



5 internal salespeople



## REGION

SERVING UK SME,  
MID-MARKET,  
ENTERPRISE AND  
PUBLIC SECTORS

“The system does have its own CRM module, but felt complicated and was difficult to access remotely for the field-based team. Instead, the sales team would download their data into multiple spreadsheets and use VLOOKUP in Excel to create tables in order to make it easier for information to be digested. As you can probably tell, this was hugely time-consuming and, unless critical, would not be completed.”

Tony outlined the additional drawbacks of their current way of working; “Difficulty in following account status, both in terms of call reporting, sales status, gaps and variance. As a Sales and Marketing Manager looking at people, product and customer performance, it proved to be incredibly time consuming and strenuous, too.”

## The Solution

Helapet was introduced to sales-i following an informative online demo. With Tony being “particularly interested in the ‘Enquiries’ facility, as I knew it would benefit Helapet immensely.” As his understanding of what sales-i offered increased, the decision became clear and the impact was evident once implemented. “We quickly recognised that this was the solution we had been searching for. The sales team at Helapet are far more productive, as they are not spending hours of valuable time on Excel spreadsheets; which means they can close more deals and reach their targets.”

## The Results

Tony explains that “sales-i has without a doubt saved time, and to save time, you become more effective and efficient in what you are doing. For example, our Account Managers can now make more calls and confidently present themselves as the most knowledgeable person, as they have more detail about purchase patterns to hand. There is no question we have our finger much more on the pulse of the business as a result of adopting sales-i. In fact, we use a medical analogy internally in that ‘with sales-i we have a chance to resuscitate the patient rather than just carry out a post-mortem’ (once the business has been lost)”.

“In addition to this, with the software being aligned to our overarching business strategy of driving increased efficiency, it supports our recent adoption of the Lean 6 Sigma; a method that relies on a collaborative team effort to improve performance by removing waste and reducing variation.”

“sales-i has without a doubt saved time, and to save time, you become more effective and efficient in what you are doing.”

Tony Phelps  
Sales and Marketing Manager



“Our business has seen a double-digit growth for both 2018 and 2019, which sales-i has certainly contributed to.”

Tony also shared that sales-i is most frequently used by Account Managers, to monitor everything to do with call planning and reporting, as well as Enquiries and Sales vs. Gaps; again, driving incremental revenue.

## The Future

Going forward, he would like to introduce more training to Helapet to give more roles the opportunity to take advantage of sales-i: “Since the initial rollout and training, we have had a trainer attend two of our quarterly Sales and Marketing Meetings, as well as having had three to four webinar sessions.

To support my team and get the most out of sales-i for all users, I will be scheduling at least one training session to focus on better utilisation of Campaigns so we can capture more data and identify prospects and further development for our Telesales team.”

sales-i offers seamless integration with



# Work smart. Sell smart.

---

## UK Head Office

Floor 3  
31 Homer Road  
Solihull  
West Midlands  
B91 3LT

0345 508 7355  
marketing@sales-i.com

## North America

200 W. Monroe St  
Suite 1701  
Chicago  
IL 60606

1-847-868-8175  
marketing@sales-i.com

## Australia

Level 23  
52 Martin Place  
Sydney  
New South Wales  
NSW 2000

6102-9220-5108  
marketing@sales-i.com

