

## Case Study

# Key Surgical

### PRODUCTS USED

**SALESPAD DESKTOP | CARDCONTROL | SHIPTO**



**THE COMPANY** Key Surgical is a Minneapolis, Minnesota-based manufacturer and distributor of sterile processing and operating room supplies that provides 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-plus products in its portfolio.

**THE CHALLENGE** Ask chief financial officer Ralph Herda to name the reasons for Key Surgical's longstanding success, and he'll give you a simple answer: "We're easy to do business with."

Key Surgical customers – hospital operating rooms and sterile processing departments – demand "easy". Not only do they need a one-stop supplier with broad product inventory capable of taking an order by fax, phone, or electronic data interchange (EDI), they need a supplier agile enough to process and ship the order that same day. "Without the products we supply, the surgery process comes to a screeching halt," says Herda. "Surgical instruments need to be sterilized properly and in compliance with industry standards."

It's a high-volume, high-velocity business. Key Surgical sets no minimum order requirements and 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, representing a double-digit increase in just the last four years. Those orders must be picked and shipped accurately.

For over twenty years, Key Surgical used Microsoft Dynamics GP (Dynamics GP) as its sales order processing platform. Despite the solution's traditional accounting and financial reporting



Key Surgical | Minneapolis, MN | [www.keysurgical.com](http://www.keysurgical.com)

### KEY BENEFITS OF SALESPAD DESKTOP

- Easy order entry
- Easy navigation
- Unlimited UDFs
- Improved workflow
- Robust sales tracking
- Technical support

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.

CONTINUED ON PAGE 2

**“WE’RE ALWAYS LOOKING FOR A ONE PLUS ONE EQUALS THREE SCENARIO,  
AND SALESPAD DESKTOP GIVES US THAT BY SIGNIFICANTLY IMPROVING  
DYNAMICS GP’S EASE OF USE FOR SALES ORDER PROCESSING.”**

Ralph Herda, CFO, Key Surgical

**THE SOLUTION SalesPad Desktop.** “We take a best-of-class approach to software deployments in order to augment our Dynamics GP ERP backbone as-needed to extend its value in important areas of our business,” Herda says. “We’re always looking for a one plus one equals three scenario, and SalesPad Desktop gives us that by significantly improving Dynamics GP’s ease of use for sales order processing.”

#### BEST-OF-CLASS SOLUTION FOR SALES ORDER PROCESSING

Key Surgical also relies on SalesPad Desktop’s standard dashboard capabilities, configuring the solution to 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 finance 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.

Herda notes that SalesPad Desktop configurations require little in the way of IT expertise and resources, an important point, given that Key Surgical has no in-house IT staff. “We engage [SalesPad Certified Business Partner] Boyer & Associates as our Microsoft Dynamics GP advisor, but our people are able to configure SalesPad for our needs.”

In addition to SalesPad Desktop, Key Surgical deployed SalesPad’s ShipTo to provide a bridge between its Dynamics GP system and third-party shipping softwares, such as those used by UPS and FedEx. ShipTo automates, monitors, and streamlines shipping workflows while adding vital tracking numbers and shipping costs to invoices and sales orders. Orders paid for with credit cards are processed and verified in real time with SalesPad’s CardControl, which allows Key Surgical order entry staff to securely process transactions in Dynamics GP and SalesPad Desktop.

**CUSTOMER, PERFORMANCE AND MANAGEMENT INSIGHTS AT GRANULAR LEVEL** Herda uses the term “transactional elegance” when describing the sophistication of SalesPad-enabled sales order processing. One-click navigation streamlines customer interactions and enables order entry staff to efficiently process multiple orders concurrently. Standardized workflows eliminate the complexities of managing credit issues and international shipments.

SalesPad Desktop’s dashboards and sales monitors are equally critical, 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 backwards. “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. “We use SalesPad to support 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.”