CB Medical Embraces Technology to Provide Superior Customer Care

SAP Business One


Medical distributor embraces digital transformation to become more resilient during challenging times.

Vision33

ABOUT

Craig Bean harnessed his distribution and medical supplies experience to launch CB Medical over 20 years ago. Today, the Alberta business distributes medical and surgical products across Canada. Its product catalog encompasses home care, wound care, and ostomy products, and its surgical division includes custom IV setups and surgical trays. The company has also attained revolutionary breakthroughs in pain management. But from the beginning, CB Medical's primary focus has been providing the highest level of customer service.

cbmedical.ca

> "Continuous improvement is always better than delayed perfection."
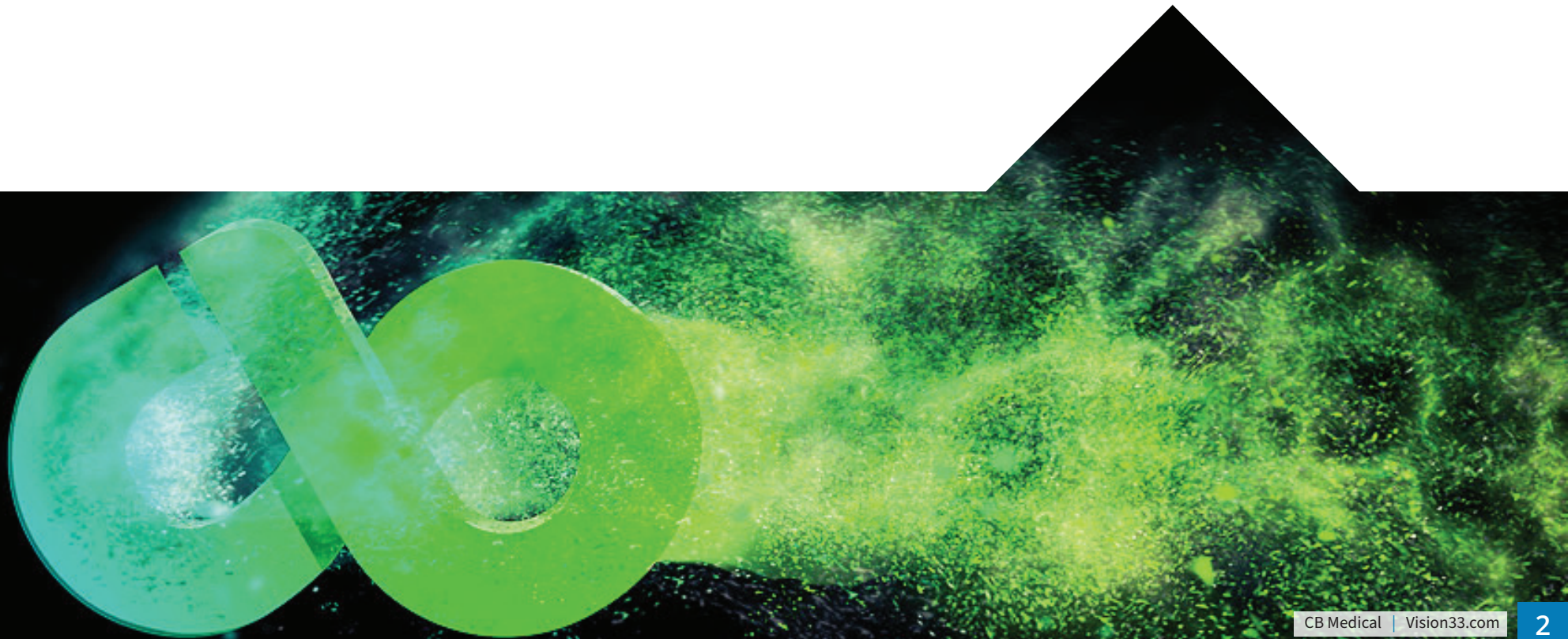
Business Challenges

- Time-consuming, manual process for fulfilling order.
- Tedious procedure for submitting paperwork to government funding program for patients.
- On-premise server had reached maturity.
- Security concerns regarding sensitive healthcare information.

Solutions

- SAP Business One Print and Deliver add-on for a significant improvement in productivity.
- Invoice automation for an improved customer experience.
- Migration to the cloud for enhanced data security.

Benefits

- The company began a digital transformation journey to become more resilient during challenging times.
- Manual processes were eliminated, saving time and allowing employees to focus on the bigger picture.
- Automation helped to overcome complex government processes for customers to receive products faster.

> *"I love implementing things that help my organization, help my customers, and make my team's work experience less stressful."*

Unprecedented times lead to a more resilient business

CB Medical solved many common business challenges in 2008 by switching from QuickBooks to SAP Business One. With this powerful ERP solution, the company enjoys real-time reporting and streamlined processes.

"We were using QuickBooks, it was a very, arduous task to process invoices and claims," Craig explains. The company had to complete multiple forms and submit them through an antiquated government website, so there was a delay in customers receiving their much-needed products.

SAP Business One's flexibility allowed Craig and his team to customize a file that could quickly upload to the government website, speeding up the process.

When the COVID-19 pandemic struck, Craig knew he had to continue CB Medical's digital transformation journey to become more resilient. "We took the lull of the first wave of lockdowns to expand our SAP system by adding B1 Print and Deliver, which has massively improved our productivity," Craig says.

Craig and his team collaborated with Vision33 to

customize templates that show the credit card transaction information on the invoice. Craig explains that "overall, a faster, more professional and environmentally friendly process."

B1 Print and Deliver automatically prints packing slips as soon as they are added and invoices are emailed to the customer immediately.

"It's a brilliant add-on," Craig raves. "Love it. Absolutely love it."

Another critical part of CB Medical's digital transformation was moving to the cloud. The company's on-premises server had reached maturity – but an even bigger concern was data security. "I wasn't interested in being a victim of a ransomware attack," Craig explains. "Because we have a government funding component, we have very sensitive healthcare information on file. Security is of the utmost importance."

Working closely with Vision33 resulted in a quick, smooth transition of the company's data from its on-premises server to the cloud. "They understood my concerns and goals for cloud migration and reacted very effectively," Craig says.

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Moving Forward

As the government moves to a new system to provide funding, CB Medical will continue to partner with Vision33 and leverage SAP Business One to make processes as easy as possible for both employees and customers. Automation allows the company to connect to a more sophisticated government system.

"I'm a tech geek at heart," Craig says. "I love implementing things that help my organization, help my customers, and make my team's work experience less stressful."

> *With SAP and the right technology, it now takes me literally two minutes to process claims - whether there is 1,000 claims or 10,000 claims. It's a fraction of the time of what anybody else can do, and I don't have overhead from extra personnel. That's primarily why I chose SAP."*

> *"We always strive to be the leader from a technological standpoint, which gives my customers the best overall experience. We can offer a higher service level because we have so many tools at our fingertips from a reporting perspective."*

Vision33 (www.vision33.com) helps growing companies deliver on the promise of technology through enterprise resource planning (ERP) solutions, including SAP Business One and Sage Intacct, automation, and integration solutions. Vision33 has the people, processes, and technology to help businesses solve everyday challenges and seize new opportunities for growth and transformation. With proprietary solutions such as iDocuments and Saltbox, Vision33 helps businesses leverage the right transformative technology for their digital transformation journeys.

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