



# Trella

## HEALTH

SMARTER GROWTH.  
HEALTHIER OUTCOMES.



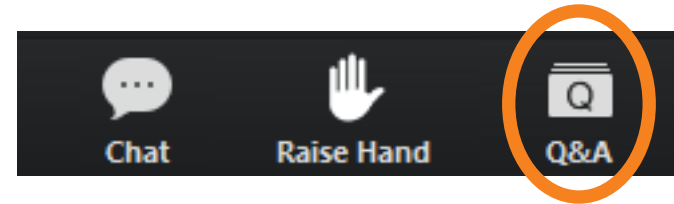
# Marketscape CRM for HME and Infusion: Your New Trella CRM Experience

August 28, 2023

# Housekeeping

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Use the “Q&A” feature at the bottom of your screen to submit a question



*We will reserve time for our Q&A session at the end*

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We are recording the session for those unable to attend today

*The recording will be sent out after the webinar is completed*

# Today's AGENDA

- Introducing the new MarketScape CRM for HME and Infusion
- What this means for you
- See it in action – LIVE demonstration!
- Project timeline and next steps
- Resources available
- Q&A



# Meet Your Trellavators

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Alex Chesnutt

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**Speaker**  
Product Manager,  
Marketscape CRM



JulieAnne Bonee

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**Speaker**  
Customer Success Team Lead



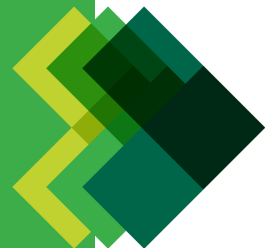
Katherine Englund

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**Moderator**  
Product Marketing Manager

# Project Objective

- Sunset our legacy Edge CRM platform to innovate faster for our customers on a single, integrated **Marketscape Platform!**
  - Unified user experience
  - Streamlined workflow, integrated visibility



# Marketscape

One Integrated Platform for All Your Growth Needs.



Marketscape **INSIGHTS**

*Robust Market Intelligence*



Marketscape **CRM**

*Relationship Management*



Marketscape **CONNECT**

*Integrations and API Connections*

***One Source of Sales Truth***

# Value of Marketscape CRM



## Executive Leaders

- Complete Account Activity Visibility
- Identify Performance Gaps
- Track Progress Toward Key Targets

## Sales Managers

- Account & Territory Segmentation
- Sales Budgeting and Forecasting
- Correlate Activity to Results

## Sales Representatives

- Productive Referral Source Engagement
- Effective Mobile Solution for Field Reps

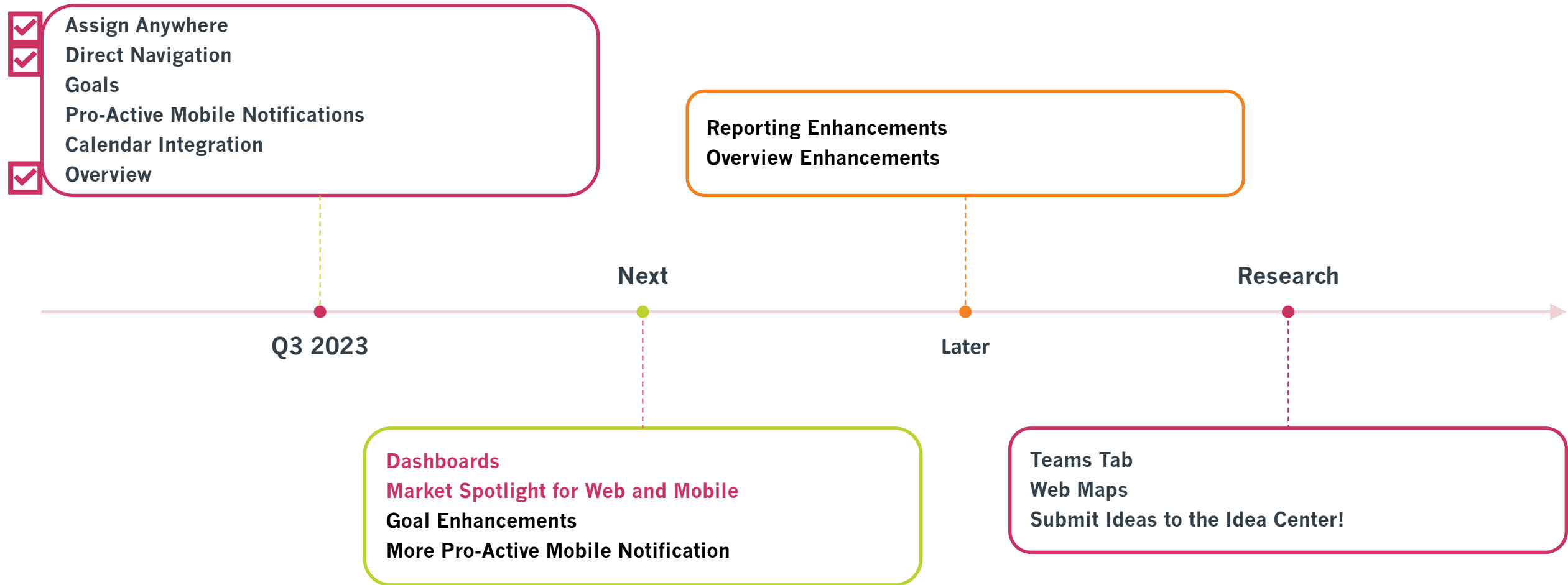


# Edge CRM vs. Marketscape CRM HME/INF

*What will users experience in Marketscape CRM compared to what was in Edge?*

NEW FEATURES	Edge	MAR CRM	What to Expect in MAR CRM
Expense Tracking	<input type="radio"/>	<input checked="" type="radio"/>	Easily enter and track expenses by user and account
Assign Anywhere	<input type="radio"/>	<input checked="" type="radio"/>	Real-time assignment flow between Marketscape Insights (MAR INS) and Marketscape CRM
Single Sign-On	<input type="radio"/>	<input checked="" type="radio"/>	Users can integrate their SSO providers with Marketscape CRM
IMPROVED FEATURES	Edge	MAR CRM	What to Expect in MAR CRM
Reporting	<input type="radio"/>	<input checked="" type="radio"/>	Increased number of reports with more calculated metrics
Efficient and Effective Mobile Solution	<input type="radio"/>	<input checked="" type="radio"/>	Faster login times and simplified navigation
No Need for Manual Syncing on Mobile	<input type="radio"/>	<input checked="" type="radio"/>	Users will no longer need to sync their phones each time they login or perform an activity
Direct Navigation	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Seamlessly navigate between Marketscape Insights and Marketscape CRM
Detailed Permissioning and Customization for Admins	<input type="radio"/>	<input checked="" type="radio"/>	Empowering users to set up the system the way they want

# Marketscape CRM Roadmap – Upcoming Features!



Highlighted Edge Favorites Coming to Marketscape CRM!





# Day of Migration Timeline and Demo!

# Timeline to Expect on September 15, 2023



Edge account is disabled.



Login Credentials to your **NEW** Marketscape CRM account are sent via email from [Products@TrellaHealth.com](mailto:Products@TrellaHealth.com) directly to you!  
**You now have access to Marketscape CRM!**

Middle of the Day

Morning of

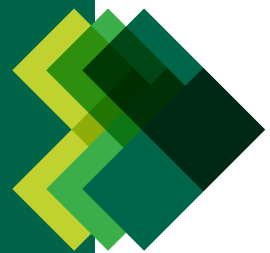
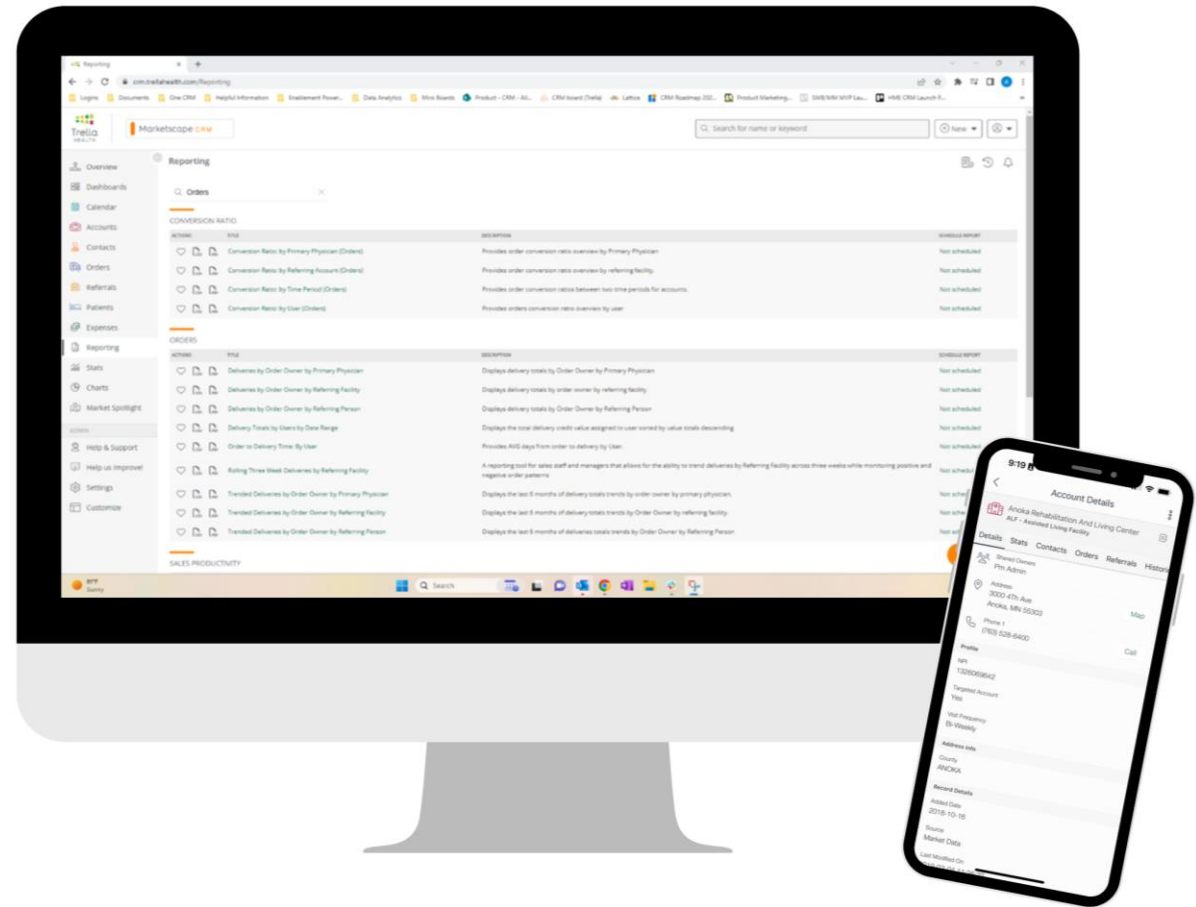
End of the Day

All activities, facilities, and contacts are moved from Edge into Marketscape CRM.



# DEMO TIME

## Let's Get into it!





What should I expect?

# What to Expect on September 15<sup>th</sup>

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- **Early on 9/15, Edge Access will be disabled!**
  - Your username and password for Edge will not grant access to your account.
  - Your Edge mobile app will no longer work.
  
- **Later in the day, Marketscape CRM credentials will be sent to you!**
  - These credentials will work on web and mobile
  - An email will come from [Products@trellahealth.com](mailto:Products@trellahealth.com)!
  - Please check your spam folder if you do not receive this email
  
- **All your Edge data will be added to Marketscape CRM for you!**
  - Accounts, contacts, events, and notes will be present in your account and available to access when you login.

# Trainings available for your team – sign up today!

## Sales Leaders and Admin

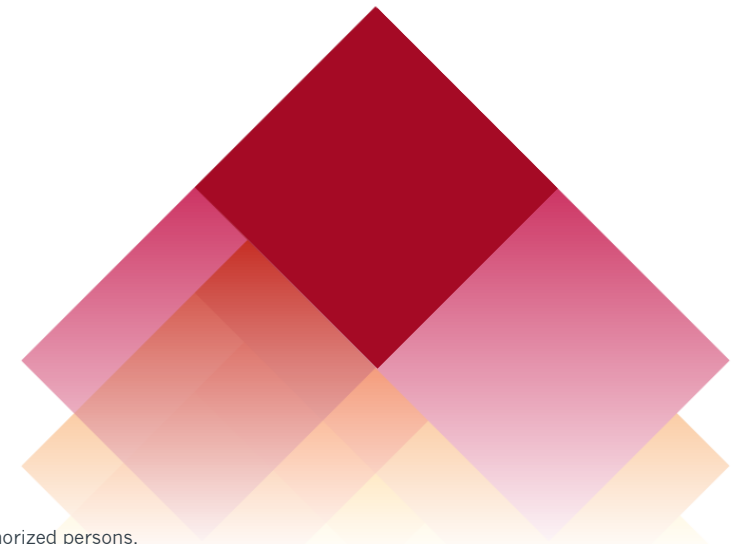
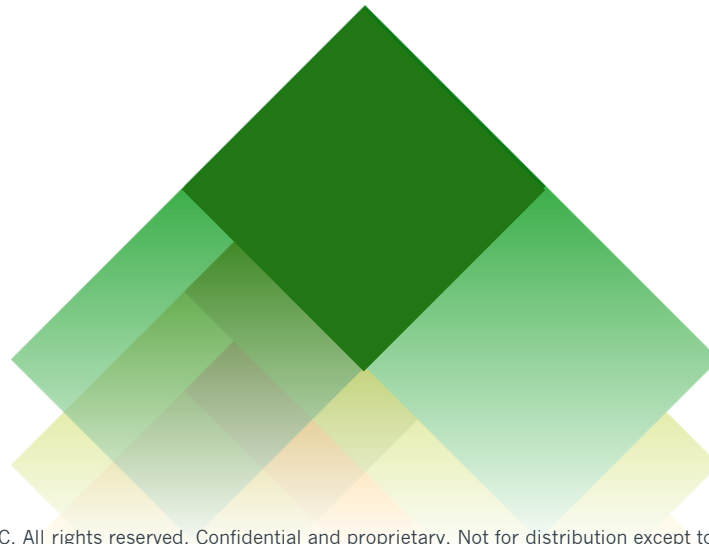
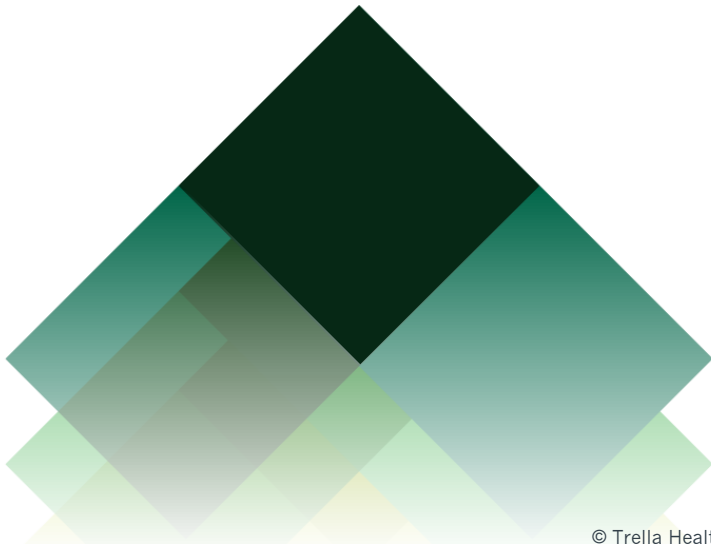
- Introduction to CRM for Sales Leaders and Administrators
  - Review comparisons from Edge to MAR CRM
  - MAR CRM Demo
  - Review CRM settings/setup to better support sales org
  - And more!
- [Sept. 18, 2023 at 10:30AM ET](#)
- [Sept. 18, 2023 at 3PM ET](#)

## Sales Reps - Web

- MAR CRM for HME/INF Sales Reps – Web
  - Overview of MAR CRM
  - Validate and create BoB
  - Understand importance of ACE process to log account-related events, and more!
  - Plan your perfect week
- [Sept. 19, 2023 at 10AM ET](#)
- [Sept. 19, 2023 at 3PM ET](#)

## Sales Reps - Mobile

- MAR CRM for HME/INF Sales Reps – Mobile
  - Best practices from CRM web training
  - Learn to log account-related events to measure and improve rep productivity
  - Navigate the mobile app for iOS and Android devices
- [Sept. 20, 2023 at 10AM ET](#)
- [Sept. 20, 2023 at 3PM ET](#)





# How to Prepare for Your Upgrade

## NOW

- Ensure your team signs up for live training webinars!
  - Intro to CRM for Sales Leaders and Administrators
  - Intro to Marketscape CRM for Web
  - Intro to Marketscape CRM for Mobile
- Access the September upgrade timeline in the Help Center
  - [Linked here!](#)

## DAY BEFORE UPGRADE (SEPT 14)

- Sync your mobile device
- **GET EXCITED!**

## DAY OF (SEPT 15)

- Download the mobile app via QR code below (Trella Marketscape CRM in app store)
- Start using the app!
- If you get stuck, view our Help Center articles or reach out to the Trella Support Team ([support@trellahealth.com](mailto:support@trellahealth.com))
- Looking for additional support?
  - Join our CS team every Wednesday from 12:30 p.m. – 1 p.m. EST
  - [Sign up here!](#)



SCAN ME

# Where can I find more information?

## Help Center Timeframe Article


[Click here to view!](#)

### September 15 Upgrade to MAR CRM - Timelines and What to Expect

 Charles Fox  
6 days ago · Updated

Follow

#### Overview

 This article outlines the September 15th Marketscape CRM Upgrade Program. Our goal is to make your platform upgrade from Edge CRM to Marketscape CRM a great experience. We are confident that moving to Marketscape CRM will allow your organization to reach new levels of sales productivity.

### Webinars - Let's get on board Marketscape CRM!

 **Orientation - Meet Marketscape CRM**

**[Customer Webinar - Monday, August 28, 2023 at 2 PM Eastern - This first webinar has three objectives](#)**  
- we will:

- Provide a **sneak peek** into Marketscape CRM so you can see where we are taking you and the value of this improved solution
- **Explain the transition** timeline so you can prepare for the change and map out steps to move your team to MAR CRM smoothly
- Allow time for **any questions** you have

## Edge to MAR CRM Transition FAQ







[Click here to view!](#)

### Transition FAQs

 Charles Fox  
2 months ago · Updated

Follow

The following FAQs will help you through the transition from Edge CRM to Marketscape CRM

-  Why is Trella Health moving from Edge CRM to Marketscape CRM?  
This transition will give you access to a fully integrated platform. This will streamline your experience as a CRM user and make you more productive and efficient in your workflow. The new solution offers new and exciting features to help you achieve your business goals.
-  Will data from Edge be transitioned into Marketscape CRM?  
Yes, all data from Edge will be transitioned in MAR CRM including orders, accounts, contacts, notes, and events
-  Will I have access to Edge while being transitioned to Marketscape CRM?  
All users will have access to Edge prior to their data moving to MAR CRM. After the data is migrated to Marketscape CRM, users will no longer have access to Edge and will be fully transitioned into MAR CRM.
-  When will I no longer have access to Edge?  
This is dependent on the migration date that we will determine with each customer. The date will vary, but all users should be provided the transition date in advance.
-  Will Marketscape CRM provide a map function similar to the map feature in Edge?  
No, but our product team is researching how to make this feature available. Not including the map allows for faster download times.
-  If I assign a rep in Marketscape Insights, will it carry over to Marketscape CRM?  
Yes, as soon as you make the assignment in MAR INS, you will be able to see the CRM record.

# Q&A



















THANK YOU



# Appendix

# Edge CRM vs. Marketscape CRM HME/INF

*What will users experience in Marketscape CRM compared to what was in Edge?*

IMPROVED FEATURES	Edge	MAR CRM	What to Expect in MAR CRM
Reporting			<p>Increased number of reports with <b>more calculated metrics</b> to give users a greater understanding of the state of the business, referral activities, and time from the referral coming in to the delivery to the patient.</p> <ul style="list-style-type: none"> <li>Sales managers can track to KPIs on the mobile app, and monitor sales rep productivity comparing events to orders.</li> <li>Executives and managers who don't have a login can be sent scheduled reports.</li> </ul>
Efficient and Effective Mobile Solution			Experience faster logins, simplified navigation, integrated features, and greater visibility with real-time connection.
No Need for Manual Syncing on Mobile			Sales reps will no longer need to sync their phones each time they login or perform an activity. When users move to MAR CRM, they will <b>save 90 minutes per month or more</b> by not having to sync. Changes will be immediately available to the rest of the organization.
Direct Navigation			Seamlessly navigate between Marketscape Insights and Marketscape CRM
Detailed Permissioning and Customization for Admins			Empowering users to set up the system the way they want, and the way that makes the most sense for their teams. Easily pivot to a new structure as the organization grows.
NEW FEATURES	Edge	MAR CRM	What to Expect in MAR CRM
Expense Tracking			Sales reps can easily enter and track expenses, including mileage, by user and account on desktop or mobile. Quickly and easily send receipts, identify spending trends, and stay on budget.
Assign Anywhere			<p><b>Real-time assignment flow</b> between Marketscape Insights (MAR INS) and Marketscape CRM.</p> <ul style="list-style-type: none"> <li>Managers can effectively execute targeting activities in MAR INS, as they will have an accurate understanding of the users assigned to specific accounts.</li> <li>Sales reps will no longer need to manually enter assignments into two different platforms.</li> </ul>
Single Sign-On			Organizations can integrate their SSO providers with Marketscape CRM to enhance the end-user experience while maintaining their organization's security standard.

# Known Term Updates for Edge CRM Customers

Feature/Tab	Edge	NEW in MAR CRM- After Migration	Notes
Calendar Functionalities	Activities	Events	Main feature of the CRM. Utilized to track touch points across referral sources.
Book of Business or Accounts	Facilities	Accounts	Accounts are the physical locations that users visit. Can be anything from a SNF to a hospital.
Book of Business or Accounts	Contacts	Contacts	No change here!
To-Do's	To-do's	Tasks	No longer tied to the activity creation process! Capture all parts of the marketing process with CRM!
Reports	Reports	Reporting	Improved reports with calculated metrics to help improve patient outcomes.
App Name	Trella Health Edge	Trella Marketscape CRM	Now an integrated Marketscape platform

# Creating an Expense on Mobile

