

Data and CRM – A Winning Combination to Drive HME Businesses Forward

How Marketscape Insights and CRM guides home medical equipment sales teams in targeting the highest value referral sources and streamlining their workflow on the road.



- Schaumburg, IL headquarters
- Providing customers with the right medical equipment to stay safe & healthy within their homes.



Darren Van Dyke,
VP of Sales



Patrick Finnegan,
Account Executive



Will Barry,
Account Executive

Customer Spotlight

Prism Health Care Services has over 20 years of experience in the durable medical equipment industry. Prism provides individuals in the greater Chicago metropolitan area and Northwest Indiana with the right medical equipment and training to stay safe and healthy within their homes. Their mission is focused on providing the highest quality health care products and services while delivering the best customer service. To help their team gain market and performance visibility to make informed decisions on targeting the best referral sources for their business, Prism Health Care Services became a Trella Health customer in 2019, now utilizing Trella’s Marketscape Insights data intelligence platform and CRM solution.

Prism executive Darren Van Dyke, VP of Sales, and Account Executives Patrick Finnegan and Will Barry shared their experience using market data and CRM, and how this increased visibility guides them in their strategic planning as well as day to day operations as they work towards their business goals.

How has Trella’s solution given you actionable data-driven insights?

“The main focus for our team is respiratory. We primarily target skilled nursing facilities, cardiologists, and pulmonologists, and are going into hospitals, family physician’s offices, and internal medicine practices. With Marketscape Insights, we are able to look at the data related to our code sets, and drill down into specific physicians to see how much they’re ordering, what their insurance mix is, and where they are located. From there, we identify these as our key targets and know to implement them into our routes,” explained Pat Finnegan.

Darren Van Dyke added, “The data also helps us understand who not to target, so our team can be more efficient in our sales tactics. We are looking to continue to utilize Trella Health as a part of our strategy for 2023 to meet our goals and be able to target the correct referral sources.”

Marketscape Insights includes commercial payer, Medicare Advantage, Medicaid, and Medicare FFS data. Trella Health has access to 100% Medicare Part A and B Fee-for-Service claims as a CMS innovator.

Customer Spotlight

As a sales team, what efficiencies have you seen in using a CRM?

"We utilize this CRM platform to plan out our calls and use it to do basically a two week to a month call out or route plan to make our sales calls," said Van Dyke.

"Checking the integration of orders received from the day before and seeing what orders we received. Then, using the data to target new areas. When you are trying to tweak your schedule, that's when this information is used the most. I can use the CRM out in the field on mobile, or I can use it for my planning the night before. If I am going into a physician's group and somebody that I want to talk to isn't there, I can pull up Trella and find another physician in the same area on the fly to visit them," said Barry.

"I agree that knowing the orders from the day before is very beneficial. It's a huge part because then we can identify if they are a new referral and set out to go visit them since they've never sent us anything before. This is key in continuing to build that referral relationship," Finnegan added.

What are your team's favorite features in Marketscape Insights in comparison to your previous data platform, Market Insight in Edge?

"In general, Marketscape Insights is more detailed. The data is just better now and it's more organized. We can make custom lists, favorite lists, all of which we didn't have before. The data is laid out in a more user-friendly way, which makes it an easier and more streamlined process when using it for targeting," said Barry.

What would your advice be to someone considering using Trella Health?

"The platform is user-friendly, and not hard to figure out. The more I use it, the more functionality I find, and the more benefits I see for myself and the Prism team," said Barry.

Trella Health is grateful to have HME organizations like Prism as a valued and trusted partner who supports our mission towards smarter growth and healthier outcomes. To learn more about Prism Health Care Services, visit their website [here](#).



About Trella Health

Trella Health's unmatched market intelligence and purpose-built CRM allow post-acute providers and suppliers to drive more effective performance and growth. Trella's solutions allow post-acute, HME, and infusion organizations to identify the highest-potential referral targets, evaluate new market opportunities, and monitor performance metrics. Paired with CRM and EHR integrations, business development teams can better manage referral relationships to advance their organizations with certainty by improving their sales and marketing strategy.

Finnegan added, "All of the data that's included within the platform is what really intrigues me. We are very data-driven, so if we can see what hospitals these doctors are out of, that's very big for us. I'm a visual learner, so the added charts and graphs for Physicians and Organizations are awesome for us.

"I also like the way you can break down your search for your new targets. You can break it down by zip code, by county, etc. There are just so many more filters available to you than what we previously had. This ability to filter makes it easier and faster, which that in turn is a money and efficiency saver."

INTERESTED IN LEARNING MORE ABOUT THE TRELLA SOLUTIONS PRISM IS USING? [CLICK HERE TO DISCOVER MORE.](#)