

## Success Story

# Salient Medical Solutions scales as revenue soars 250%

Healthcare and beauty products distributor boosts efficiency 200% while delighting customers



### The challenge

Though it had Sage 300 in place, Salient hadn't taken advantage of the solution to automate and streamline business processes. The company struggled with labor-intensive manual work that hurt efficiency, visibility, and customer experiences.



### The solution

A new CFO and a new Sage Business Partner made it a priority to capitalize on Sage 300's many capabilities to automate order processing, optimize inventory, streamline financials, and strengthen compliance across a best-of-breed environment.



### Results with Sage 300

Salient has improved business efficiency 200% by fully leveraging Sage 300 and Sage partner solutions. It's virtually eliminated order processing errors while dramatically improving satisfaction among B2B customers and Salient staff alike.

- Grew revenue 250% with minimal staff increase
- Avoided the cost of 12 to 15 FTEs otherwise needed
- Eliminated 38 hours a week of manual order processing

**Company**  
Salient Medical Solutions

**Location**  
Toronto, Canada

**Industry**  
Wholesale & Distribution

**Sage Product**  
Sage 300

**Partner**  
Pur-Logic Solutions

### About Salient Medical Solutions

Salient Medical Solutions is a leader in bringing world-class medical technology to the Canadian marketplace, supplying health and beauty products to surgeons, ophthalmologists, dermatologists, cosmetic doctors, med spas, and others.



### **Manual work hurts efficiency, customer experiences**

Incorporated in 2013, Salient Medical Solutions is a trusted supplier of medical products for skin care, vision, orthopedics, wellness, aesthetics, and more. Its healthcare practitioner customers rely on Salient for world-class medical technology that helps address a broad range of ailments.

But for several years, Salient struggled with ailments of its own. The Toronto-based company became bogged down with labor-intensive manual processes that hurt efficiency, visibility, and customer experiences. From accounting to inventory management, Salient risked falling behind as competitors embraced digital technology.

That changed when Salient brought in a new Sage Business Partner and a new CFO, Lydia Potter (known as “LP”), an innovative and accomplished leader with experience in modernizing small to mid-size businesses. In just a few years, Salient has transformed itself into an agile company that can scale amid rapid growth.

“When I joined, Salient was small and struggling,” says LP. “Today we’re a well-oiled machine. We’ve grown revenue about 250% since I started in 2019, and I haven’t had to add a lot of staff because we’re automating everything.”

### **Unleashing the power of Sage 300**

The key to Salient’s success has been taking advantage of a Sage 300 ERP system that had been underutilized. LP and the Sage Business Partner, Pur-Logic Solutions, have focused on unleashing Sage 300’s many capabilities while integrating it with best-of-breed applications. “Salient is a great example of a company that’s made tremendous improvements by embracing digital transformation,” says Fay-Ellen Salmonson, managing partner at Pur-Logic Solutions. “They’re taking advantage of the power of Sage 300 to the max, along with Sage’s extensive community of partner solutions.”

With Pur-Logic, Salient has upgraded to the latest version of Sage 300 and its inventory management module, and incorporated Sage partner solutions including Commerce Build for ecommerce, Accu-Dart for warehouse management, HubSpot for CRM, and Orchid Systems for bin tracking, return merchandise authorization (RMA), and customizations.

LP, who has used Sage 300 at several previous companies, credits Pur-Logic for helping Salient innovate and optimize with a knowledgeable, resourceful, and responsive approach to client service.

“Pur-Logic has been a great partner,” LP says. “The Pur-Logic team really cares about our business, collaborates with us to understand our challenges, and brings a lot of knowledge and experience in helping us come up with solutions.”



Salient Medical Solution employees innovate and optimize with Sage 300.

### **Efficiency and customer satisfaction soar**

The results have been remarkable. LP estimates that operational efficiency has soared 200% as Salient has replaced time-consuming manual processes with automation anchored by Sage 300, with about 15 users.

The 35-person company would have needed an additional 12 to 15 full-time staff if it experienced the same rapid growth in its previously manual environment, LP says. Instead, Salient has eliminated 38 hours a week of error-prone order processing.

“We can grow the business at unlimited scale with Sage 300 without adding a lot of staff because we’re not doing anything manually other than pick and pack in the warehouse,” LP says.

A new ecommerce platform and on-demand visibility into orders, payments, and shipment status has dramatically improved B2B customer satisfaction while minimizing support calls.

“We used to have a lot of problems with wrong orders and shipments—not anymore,” LP says. “That’s a huge benefit because we’re not wasting time chasing problems, and our customers aren’t upset because they received the wrong product or delivery was late.”

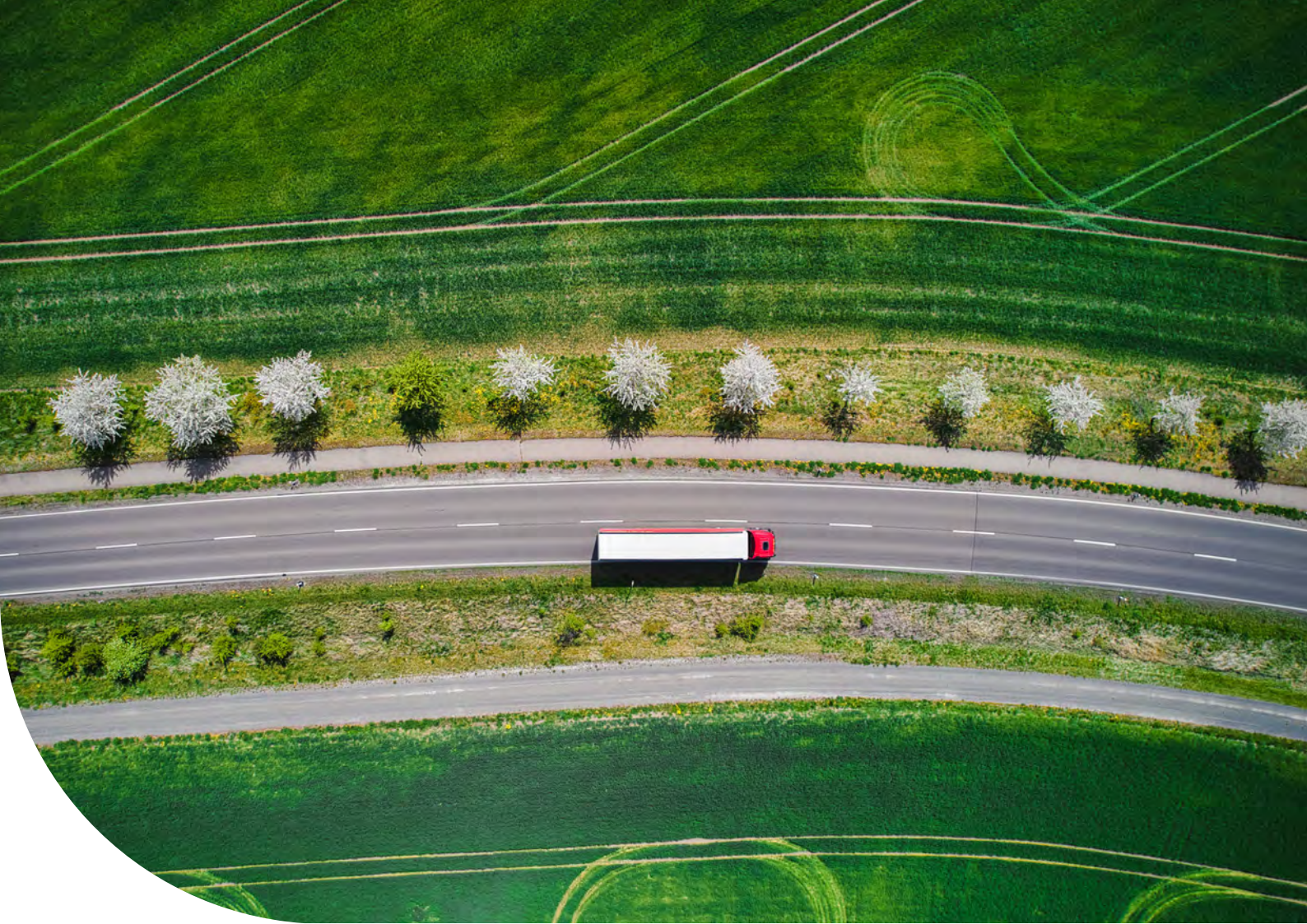
### **Liberating staff for value-add projects**

Employee satisfaction has also risen as staffers have newfound time and ability to innovate and optimize with value-adding projects, rather than enduring long days of manual data work.

“Staff would spend all day processing orders, and now we can focus on initiatives that add value to the business,” LP says. “We’re always improving. If we’re doing something repetitive, we look to Sage 300 and ask, ‘How can we do this better?’”

If the company does need to hire, modern automation technology is far more attractive to the younger digital native workforce, LP notes. Plus, Salient’s Sage-based environment allows staff to work from home one or two days a week, contributing to higher job satisfaction and retention.

“It’s become difficult to find good staff, and the latest generation wants technology. If I bring new people in and they have to do things manually, I won’t be able to keep them,” LP says. “Our staff now is really involved in optimization projects and contribute their own ideas. They love the process and that’s one reason we’re able to retain employees.”



### **Improved inventory and compliance management**

With SKU and order volumes rising amid growth, Salient is benefiting with spot-on inventory management through Sage 300 that helps ensure optimal stock levels while avoiding needless inventory carrying costs.

“Sage 300 inventory capabilities help us with managing inventory and re-ordering,” LP says. “We’ve recently turned on another capability in the inventory module that gives us report cards on our vendors and how they are doing.”

Utilizing Sage and partner technology, Salient now has full product track and trace capabilities at the lot, serial number, and bin levels—critical to comply with Health Canada regulations governing certain healthcare products.

The company recently notched a clean systems compliance audit, and has secured certification with ISO 13485, an international standard applying to medical devices. That’s increased business with both distributors and customers.

“One great thing about Sage 300 is the auditability,” LP says. “We have full visibility and full tracking. If a manufacturer does a product recall, we have everything documented on the back end.”

### **‘A Stronger, Healthier Company’**

Salient is leveraging Sage 300 reporting and analytics to improve profitability. For instance, it eliminated several underperforming products based on reporting insights that showed sales and margins were subpar.

“We’ve become a stronger, healthier company with Sage 300,” LP says. “It’s made us a lot smarter about everything because we can make decisions based on reality, not guesswork.”

Further improvements are in the pipeline as Salient integrates Sage 300 with its HubSpot CRM system, which will help optimize sales rep pipelines and further automate the order-to-cash cycle.

Salient now closes its monthly books in just two business days, while in the past it didn’t do a traditional monthly close. Year-end financials that used to drag on until June are now complete by the end of January.

LP is a believer in the power of the platform to transform a small to mid-size business. “Sage 300 will do whatever you need it to do,” LP says. “You can get the basics up and running quickly and easily, and once you’re familiar with that, it’s easy to advance to the next level because everything is integrated. It’s made us much more operationally efficient.”



Sage

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