

The Silent ROI Gap

Why healthcare orgs underuse Salesforce, how to spot it in your org, and how to fix it.

Many healthcare Salesforce environments underperform. Some run at 10-20% of what the platform can do. Others use it heavily and still carry risk through credentials tracked in spreadsheets, CE credits matched by hand, and expired records still marked active.

Salesforce can do far more than most healthcare organizations ask of it. Processes change and the system stays put. That's fixable.

The 5 problems we see most

1

Credentialing in one head

Certification steps and verifications live with one person who knows them.

"Only Alanah knows the recert steps."

2

CE credits matched by hand

Staff reconcile attendance and credits in spreadsheets before certificates go out.

"We reconcile credits in Excel."

3

Expired, still marked active

Licensure status changes, but the member record doesn't change with it.

"Is this license still current?"

4

Rules move, system doesn't

Board and state rules change, but the system still runs the old ones.

"That's how the rule used to work."

5

Member tiers updated by hand

Residents, fellows, and emeritus members need tier and access changes made manually.

"Can someone update her member tier?"

What top healthcare organizations do

"In credentialing, accuracy is the whole job. One wrong record puts your name at risk."

Tanya Renne
Founder & CEO, Orchid Connect

Map the full process

Every manual step and every system included, so the gaps show.

Keep the system current

Configuration keeps pace as board and state rules change.

Let staff shape the process

People who use Salesforce daily influence how it evolves.

Track credits where they happen

Registration, attendance, and credit connect so certificates issue on time.

6K members returned

One national membership organization had a stalled implementation. Orchid fixed renewals first, then new member certification, then event insurance compliance, each in weeks. Chapters now manage their own rosters, reports, and signatures. The technology wasn't the only reason members came back, but it was a strong enabler of the results.

\$1M in first-year revenue

A national organization is rolling out seven portal experiences for members, sponsors, students, and affiliates, and expects to retain or grow about \$1M in year one.

Who the Roadmap is for

- Good fit**

Medical societies, specialty boards, certifying bodies, and health nonprofits on Salesforce 12+ months, facing any of the 5 problems, or burned by a previous partner.
- Not a fit**

Not yet on Salesforce, or clinical care providers.

The Salesforce ROI Roadmap

- A 30-minute 1:1 with you and Tanya Renne.
- You leave with a prioritized list of what to fix, sequenced by effort and impact. No obligation to continue.

Book Yours

Solved. Simple.

Orchid Connect

Salesforce consulting, managed services and tech specializing in health nonprofits, medical societies, and certifying bodies.

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