



PeerPoint's journey with SMBHD began in 2016. SMBHD has implemented a Backoffice tool to automate all phases of PeerPoint's Continuing Medical Education (CME) accreditation process. SMBHD configured Salesforce Sales Cloud and Gmail integration, and Sales Cloud Community to integrate with the CME Backoffice system.

PeerPoint needed a solution that could address several core business needs:

- **Connect Salesforce with CME Backoffice.**
- **Implement Salesforce Community for medical professionals.**
- **Automate document collection with the CME Backoffice.**
- **Track, print, and distribute accredited certificates.**
- **Allow doctors to sign contracts, disclosures, and COI forms on their computers or mobile devices.**

Overall, PeerPoint needed an innovative system that would allow for an end-to-end system to integrate the CME BackOffice, track accreditations, and automate data collection.

In response to these challenges, PeerPoint approached SMBHD with the goal of a three-phase project: Implement the Backoffice tool, Salesforce Sales Cloud, and Community Cloud.

"Think about how it would work if the disclosers were using an online system that is easy to navigate and keeps records of the results."

Kevin Callahan, CEO/COO

CUSTOMER

PeerPoint Medical Education Institute
www.peerpt.com
Evanston, IL

COMPANY PROFILE

Employees: 30
Industry: Education Management

ABOUT

PeerPoint Medical Education Institute, along with their Joint Providership partners, designs, implements, and executes an accredited medical education system to improve patient outcomes through high quality, innovative, and needs-based initiatives that enhance the delivery of health care.

SOLUTION AT A GLANCE

Salesforce Sales Cloud
Salesforce Community Cloud

COMPONENTS



Salesforce helped PeerPoint create a 360° understanding of their business performance, specifically in the areas of business process improvement, community management, and data automation.

80%

increase
Community Portal Usage

100%

increase
Signing Documents electronically

PeerPoint's goal was to create an innovative system that would allow them to provide the best information, education, and tools about medical education certification to support their clients and partners. By implementing Salesforce Sales and Community Cloud, they can easily track partner education, certification, education, toolkit, and process improvement.

RESULTS

After implementing a multi-phase solution, PeerPoint can now focus on its clients by helping them succeed. Their doctors have an automated system to claim CME credits, automated documents, the ability to sign documents and forms all in a single interface. As a result, the system was easy to navigate and helped clients spend less time on the process and save money.

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