

# Growth Opportunities for Infusion Organizations Through Market Data Insights

Hear how Vital Care Infusion Services, the #1 franchise business for infusion services and the 5th largest infusion service in America, leverages market data and CRM to continue growing into new markets



- Headquartered in Brentwood, TN
- Founded in 1986
- Expanding access to high-quality infusion therapy and driving better patient outcomes



**Jay Arnold**  
Operations Consultant  
Vital Care Infusion Services

## Customer Spotlight

Vital Care Infusion Services was founded in 1986 as the first franchise model for infusion services. Now, with over 65 infusion pharmacy franchises in around two dozen states nation-wide, they are continuing to grow and provide high-quality services to patients. Vital Care’s mission is to expand access to high-quality infusion therapy and drive better patient outcomes by providing safe, convenient, and professional infusion services through locally owned and operated infusion pharmacies. With their goal of continuing to grow and expand their services, Vital Care became a Trella customer in 2015, utilizing Trella’s market insights and CRM with an EHR integration.

Jay Arnold, Operations Consultant at Vital Care, shared how Vital Care optimizes their utilization of the Trella Health platform to continue to grow and find new opportunities in their market.

### Can you describe your role at Vital Care?

“I started in 2017, and I was fortunate to be asked to join the team to look at strategy, growth, and process. We put together a formal strategic plan in 2017 to increase growth, and since then we have continued to see accelerated growth, particularly over the last three years under the new leadership team.

I am in the sales and operations group at Vital Care. As a franchisor, we are responsible for supporting the franchises and giving them a ‘business in a box.’ This is a rewarding business. The infusion space provides a critical service to help people in the communities we serve. Our role is to support both the new franchises as they start their business, and to support the existing franchises as they grow and to set them up for success.

We have expanded to the point of being in basically all four corners of the US, and we still have room to grow. What’s been so exciting to me is to be able to roll out and serve as the project manager for Vital Care’s Trella implementation. Medical data is critical, and we are helping to save lives and improve lives through what we do.”

### What has the greatest impact been with using data and an integrated CRM?

“The short answer is that referrals are going up. We’re growing well above the industry average by using the tool. We are doing several things, but the Trella solution has had a significant positive impact on our revenues.”

**“We are growing faster than the industry and we attribute Trella, the CRM tool, and market insights as being a part of our rapid growth.”**

## Customer Spotlight

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### **How do you and your team utilize the market data within Marketscape Insights?**

"We use the Marketscape Insights product to prospectively look for ideal locations to add new franchise sites. We started in the Southeast, so we are now thinking about how we can fill in the whole map of the US to be a true national brand from coast to coast. We use the Trella data to say 'Where are good geographic locations to put a new franchise?' Then we recruit and advertise and go through a sophisticated process to select, partner with, and sell franchise locations where we feel we will have the best chance for success, again, using the Trella data as a part of this market analysis. We then use the data to help franchise account executives and owners map out their sales-call routing plans for optimal referral-source management."

### **What was it like prior to having the Trella data solution?**

"Before we had the data it was like a needle in the haystack game. I say that lightheartedly because our franchise locations are amazing with very knowledgeable employees. When looking at the Trella data, even the folks that have previous knowledge say 'Wow, I had no idea this doctor referred this much or that this location did this much business' or 'Wow, I didn't realize this location did so much business with my competitors, I thought I was the only one, so it's really interesting to see that another company is getting referrals from this physician.' The Trella solution has really provided us with clarity and a playbook for our franchisee sales staff account executives."

### **How has the workflow improved with using a CRM with EHR integration?**

"The CRM allows the account executives to have a playbook and set process while also building accountability. With Trella's CRM, we build out plans and we work with the franchise owners and the account executives to say, okay, what kind of business do you want to go after? There's a lot of different types of business in the infusion space, so we try to find a healthy mix. Based on this, we literally build out the account executives' route plans and where they are going to be each day out in the field. They plan their work from the office on their desktop computer and then they use the CRM app on their phone when they're on the road. So now when they are in accounts, they not only have the information about the referral source at their fingertips, but we have also integrated the Trella CRM product with our EHR implementation. So, all of the orders that go through the pharmacy through the EHR platform are now integrated. With this, the account execs and owners of the franchise locations can go straight to the Trella product and see the orders and the status of things right on their phone. It's critical that the account executives who are out there asking for referrals use the CRM so they can find the folks to go visit and then schedule and manage their activities. It also allows the franchise owners to track their team's progress."

### **What is your advice to someone considering using Marketscape Insights and CRM for HME and Infusion?**

"Embrace it fully and use all the tools. Do a full implementation and trust the data. Realize that the data isn't going to be 100% of an answer across the board, but it is going to give you such an edge over not having access to these insights and a platform like this."

Trella is thrilled to have Vital Care Infusion Services as a trusted and valued partner who supports our mission towards smarter growth and healthier outcomes. To learn more about Vital Care, visit their website here.

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**INTERESTED IN LEARNING MORE ABOUT THE TRELLA SOLUTIONS VITAL CARE IS USING? CLICK HERE TO DISCOVER MORE.**

#### **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.