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Case Study from Vitalis Corporation

ABSTRACT

This presentation was prepared by the Vitalis Corporation's sales enablement team. It details how they uncovered **$800M in revenue risk** and **significant sales inefficiencies** using Groopit AI with real-time data from employees. To protect confidentiality, the company name and details have been modified, but the problem statement, methodology, and insights remain true. Vitalis's approach provides a blueprint that any company can use to diagnose and solve complex business problems with data-driven precision, utilizing Groopit.

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Vitalis Corporation Sales Enablement Assessment & Debrief in Partnership with Groopit

The Problem

CORE PROBLEM STATEMENT

Corporate teams reported being inundated with a high volume of daily requests from frontline field representatives, requiring substantial time and effort to address. While these requests are valuable, they fall outside the current scope of work that can be delegated to other teams, creating ongoing resource strain.

VALIDATION GAP

The problem was difficult to validate because ad-hoc requests fall outside any single structured system that allows measurement. Since requests are made and handled on a case-by-case basis, through collaboration, there is no clear way to quantify how often they occur, why they occur, or the resources required for resolution. To understand this problem — then determine if or how to solve it — a deeper diagnostic assessment was required.

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The Goal

Our goal was to quantify the problem as well as understand the root causes qualitatively, focused specifically on the daily ad-hoc requests from the field that require corporate support.

Our intent was to answer the following questions:

What ad-hoc support is actually occurring today?

What types of issues require corporate involvement?

What is the quantity and frequency of ad-hoc support provided?

How long is it really taking to provide this support?

What is the business impact?

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The Approach

REAL-TIME DATA

Our approach to gain a clearer understanding was to gather real-time data on the problem. The corporate team tracked every ad-hoc inbound request from the field over for a one-month period. Each request was documented along with key data points, including the exact wording used by field personnel.

SPECIFIC DATA GATHERED FOR EACH INCIDENT

The request (actual text)

Type of request

Associated line of business

Associated opportunity revenue and account

Role of requestor

Resolution requirements and level of effort

Any additional insight

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The Experience

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OUR REQUIREMENTS

To accurately diagnose this problem, it was essential to capture information about each event the moment it occurred. This eliminated ambiguity, gave us a precise diagnosis and ultimately enabled us to address the root causes rather than just the symptoms. Achieving this required a simple user interface, where employees share data in less than one minute from wherever they work.

THE USER INTERFACE

Groopit allowed employees to share real-time data from wherever they work.
Each ad-hoc support request was captured in less than one minute, with a few quick taps, from Salesforce, any Slack channel, email, or a mobile device.

Ad-hoc support

Request:	
Type:	Customization
Line of business:	Diagnostic
Product:	MRI Equipment
Account	Sound Medical
Opportunity	$17M
Requestor role	TAM
Expected resolution	<1 Hour
Additional insight	

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The Technology

Groopit AI facilitated the entire process, from gathering the real-time data from employees to identifying patterns.
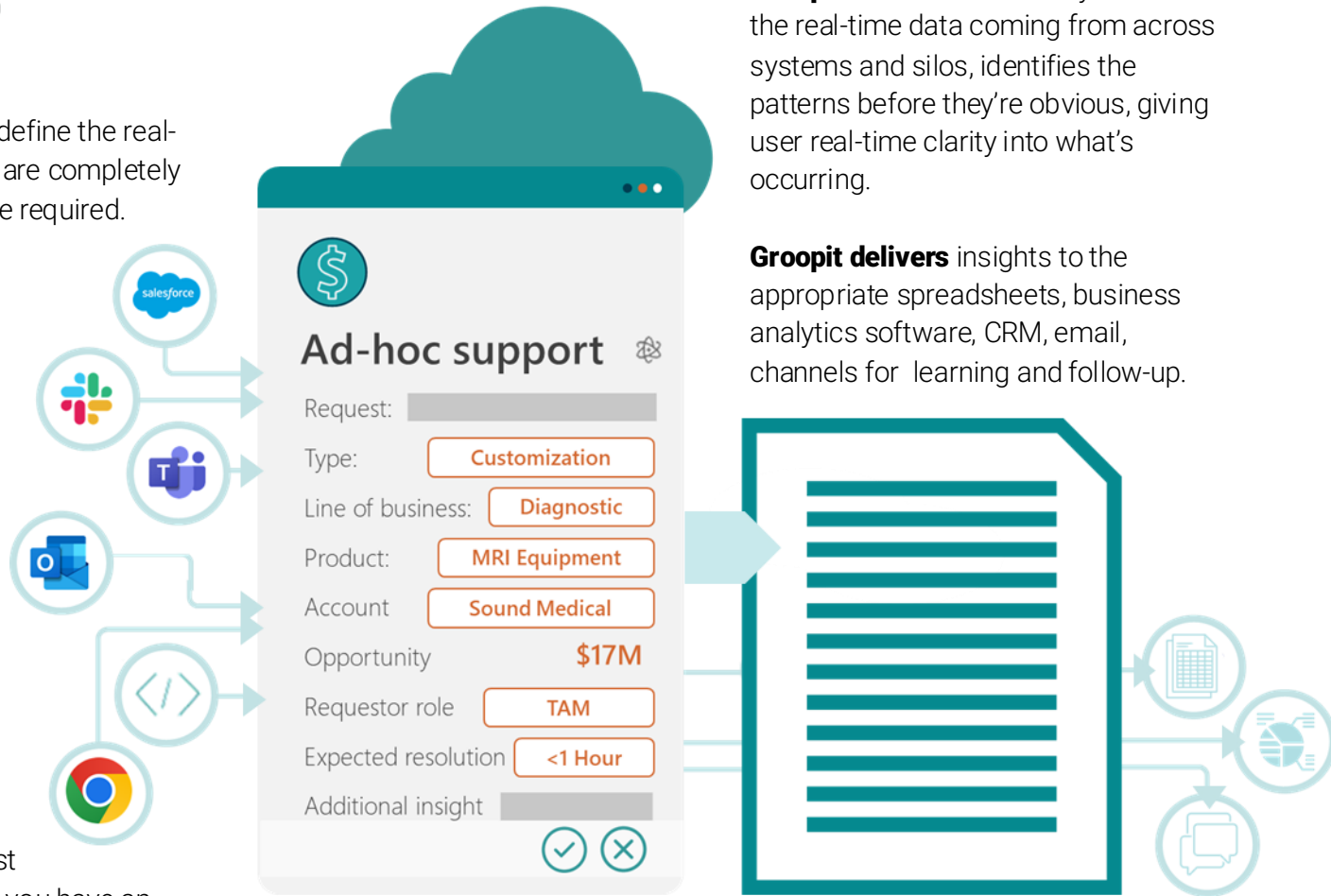
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Groopit Data Models define the real-time data needed and are completely configurable – no code required.

Groopit AI extracts details out of email or any initial request so employees can share with a click.

Groopit Connectors allow real-time data to be shared from across systems

Groopit inherits data from Salesforce.

Keywords prompt users to share. "You just mentioned request. Do you have an ad-hoc support request to share?"

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Groopit Generative AI analyzes the real-time data coming from across systems and silos, identifies the patterns before they're obvious, giving user real-time clarity into what's occurring.

Groopit delivers insights to the appropriate spreadsheets, business analytics software, CRM, email, channels for learning and follow-up.

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The Numbers

Data from 2,789 ad-hoc field requests were gathered through Groopit resulting in the following statistics.

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1,089
Ad-hoc field requests occurred 2,789 times…

28
over a period of one month, 28 days…

87%
and 87% of the requests came from field positions below L62.

64
The requests were serviced by 64 unassigned corporate staff members

19
Consuming equivalent time of 19 FTEs

24
Different paths to resolution.

98%
98% of issues were resolved through 8 paths

31%
Were complex, requiring multiple days and discussions to resolve

48%
Resolved in <24 hours

21%
Left unresolved

$67M
Sales relying on ad-hoc assistance during the one-month data gathering period.

$800M
The correlating annual at-risk revenue when multiplying $67M * 12 months.

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The
Patterns

Groopit AI identified five patterns in the data. This is the summary insight for pattern number 1.

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1 Device Availability

Field personnel often engage corporate support when a prospect or customer requests specific medical devices, or brands that are not readily available through our company's existing supply chain. These situations can arise when customers have strict vendor preferences, require niche products, or are looking for alternatives to what we typically offer. Addressing these requests efficiently is critical to securing new business and maintaining customer satisfaction.

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The Patterns

Groopit AI identified five patterns in the data. This is the summary insight for pattern number 2.

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2 Compliance associated orders

Placing orders when contract compliance is required can be challenging for field personnel. The difficulties field personnel may encounter are related to minimum order quantities, contractual pricing commitments, or industry-specific regulations that impact product eligibility. Without clear guidance, these complexities can slow deal closures and increase the risk of rejection due to compliance issues. Ensuring smooth order fulfillment requires coordination between sales teams, contracts, and logistics to prevent delays and disruptions.

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The Patterns

Groopit AI identified five patterns in the data. This is the summary insight for pattern number 3.

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3 Customization Requests

There is a recurring pattern of requests for customer-specific modifications, configuration, or unique packaging that falls outside of standard offerings. Field teams struggle to determine if these requests can be accommodated, who needs to be involved for approval and what the potential cost implications are. These requests frequently occur in the context of large-scale projects, high-volume orders, or competitive bidding situations. Ensuring a clear and efficient process is crucial to maintaining sales momentum and customer confidence.

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The Patterns

Groopit AI identified five patterns in the data. This is the summary insight for pattern number 4.

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4 Systems & Process Confusion

Field personnel frequently encounter challenges navigating internal systems and processes. These issues range from difficulties in selecting correct product configurations to confusion about product origins and lot tracking. Additionally, understanding reimbursement coding can be complex, leading to confusion. Uncertainty in these areas can slow down sales efforts, create inefficiencies, and lead to miscommunication between teams. Providing better guidance and streamlined processes can enhance productivity and reduce friction.

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The Patterns

Groopit AI identified five patterns in the data. This is the summary insight for pattern number 5.

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5

Vendor Coordination

Effective communication and coordination with vendors are essential to closing business but are often problematic. Common challenges include delayed vendor responses, unclear supplier policies, and inconsistent communication regarding product availability or lead times. These issues can create bottlenecks in the sales and fulfillment process, leading to customer dissatisfaction. Strengthening vendor relationships and establishing more efficient communication channels can help mitigate these challenges and improve overall responsiveness.

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The Scope

Real-time data from Groopit also allowed us to calculate the people involved and determine its broad scope.

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5 types of frontline requestors by role

1. Account Executives
2. Technical Account Managers
3. Field technicians
4. Subject Matter Experts
5. Team Managers

7 of 9 lines of business associated

1. Diagnostic & Imaging Solutions
2. Surgical Technologies & Instruments
3. Patient Monitoring & Wearable Health
4. Therapeutic & Rehabilitation Systems
5. Implantable & Biotechnical Devices
6. Consumable Medical Products
7. Digital & Connected Health Solutions

Varied corporate staff across disciplines

1. Support & Services
2. IT & Systems Support
3. Legal & Contract management
4. Supply Chain & Delivery Expeditors
5. RFP & Proposal Teams
6. Cross-Functional Peers

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The Outcome

$800M Revenue Risk

The project transformed what was once ambiguous into a well-defined, quantified problem—one that can now be addressed with precision. The questions we set out to answer – about quantity, frequency, type, and impact of ad-hoc support requests have all been answered. But, throughout this diagnostic process, one insight stands out above the rest: an estimated **$800 million in annual sales opportunity is at risk due to the lack of trackable, reliable processes** that ensure field sales teams receive the support they need to close deals. Without structured assistance, winning these opportunities remains uncertain, underscoring the urgent need for process improvements.

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Next Steps: The Priorities

OUR MISSION

Our mission moving forward is twofold: **mitigating the $800M revenue risk** and **boosting efficiency across teams**. By streamlining processes and ensuring faster, more reliable support, we enable field teams to close more deals while reducing the operational strain on corporate resources.

Our approach is to start by investing in four key improvements.

4 KEY IMPROVEMENT AREAS

1. Centralize Requests: Implement a single process to track field requests in real time, improving visibility and eliminating bottlenecks.

2. Streamline Resolution by Request Type starting with the top 3: Customization requests and approvals. Device & product availability resolution. Product configuration confusion in self-serve systems.

3. Meet a 2-Hour SLA: Ensure fast, reliable support to help sales act quickly and close more revenue.

4. Measure & Optimize: Track key metrics, quantify impact, and refine strategies to boost efficiency and protect revenue.

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Next Steps: The Technology

OUR PARTNER

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We will continue utilizing Groopit to implement next steps so that there's one simple experience to get real-time data from the field and engage corporate teams.

GROOPIT ALLOWS US TO

1. **Get precisely the right, real-time data** – no coding required or waiting for a systems administrator to configure.

2. **Get data from across systems and silos** - we get a complete, unbiased view of the problem while allowing employees to work from the tools they already use.

3. **Analyze incoming data and identify the patterns** - replacing hundreds of person-hours and eliminating potential bias.

4. **See all source** data – allowing us to fact check AI conclusions.

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ABOUT GROOPIT

Groopit is the only AI engine for real-time human intelligence. It combines high quality data from employees with artificial intelligence to transform business results. For more information, to see a demo, or to request a free consultation, contact Groopit at **hello@groopit.co** or visit **groopit.co** to learn more.