

CASE STUDY

How UNION-MEDIC built a structured CRM foundation for growth

This case study was developed by Media-Soft, based on insights provided by the CRM Administrator of UNION-MEDIC DOO Novi Sad.

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What happens when a pharmaceutical company decides to move beyond spreadsheets and build a structured, centralized CRM environment?

For UNION-MEDIC DOO Novi Sad, the answer was clear: greater visibility, faster execution, reduced administrative workload, and a foundation for future AI-driven analytics.

As a growing Serbian pharmaceutical manufacturer, UNION-MEDIC recognized that manual Excel-based processes for visit reporting, secondary sales analysis, and database management were no longer sustainable.

Limited access to real-time data and time-consuming administrative tasks were slowing down both field teams and management.

The company partnered with Media-Soft to implement a comprehensive CRM solution designed to automate processes, centralize data, and create a structured, scalable operating model.

The challenge: Fragmented data & manual processes

Before implementing Media-Soft CRM, UNION-MEDIC relied heavily on Excel-based processes:

- Secondary sales analysis performed manually
- Visit reports managed outside of a centralized system
- Limited access to real-time data
- Significant time consumption for sales reps and management

The organization needed:

- Full automation of sales data processing
- Centralized institution database
- Better visibility into field activities
- Reduced administrative workload
- More actionable insights

The implementation experience

The implementation phase required significant effort, particularly in structuring and connecting institutional sales data. Data harmonization, database structuring, and process alignment demanded precision and close collaboration.

Despite the complexity, the overall experience was evaluated as positive, supported by strong communication and hands-on guidance throughout the process.

The result: a fully web-based CRM environment accessible anytime, from anywhere, structured, centralized, and ready for scale.

One of the most demanding phases was importing and connecting secondary sales data with institutions. The process required significant manual effort due to:

- Creation of missing institutions
- Data inconsistencies (special characters like č, ć, etc.)
- Technical limitations during filtering and page navigation
- Time-intensive data cleaning procedures

Despite the complexity, the collaboration remained strong.

“All of the problems and situations we encountered were weathered through thanks to Danijel.”



CRM usage today

Today, the CRM platform plays an active role in UNION-MEDIC's daily operations, supporting field teams and management with structured planning, reporting, and performance visibility. What began as a system primarily focused on operational efficiency is now evolving into a broader analytical environment. As adoption matures, the organization is progressively shifting its focus from basic execution and activity tracking toward more advanced sales analysis and data-driven decision-making, laying the foundation for the next phase of CRM value creation.

Sales representatives report faster preparation of visits and clearer performance tracking.

"The sales reps have reported that they need less time to plan visits and prepare reports."



Currently, UNION-MEDIC primarily uses:

- Calendar (visit planning and reporting)
- Dashboards
- Initial AI functionalities (Ask Nikola)

The organization is now transitioning toward deeper sales analytics.



Impact & Results

Since implementation, key improvements include:

- Less time required for visit planning and reporting
- Improved visibility through dashboards
- Better structured and centralized data
- Web-based accessibility from anywhere

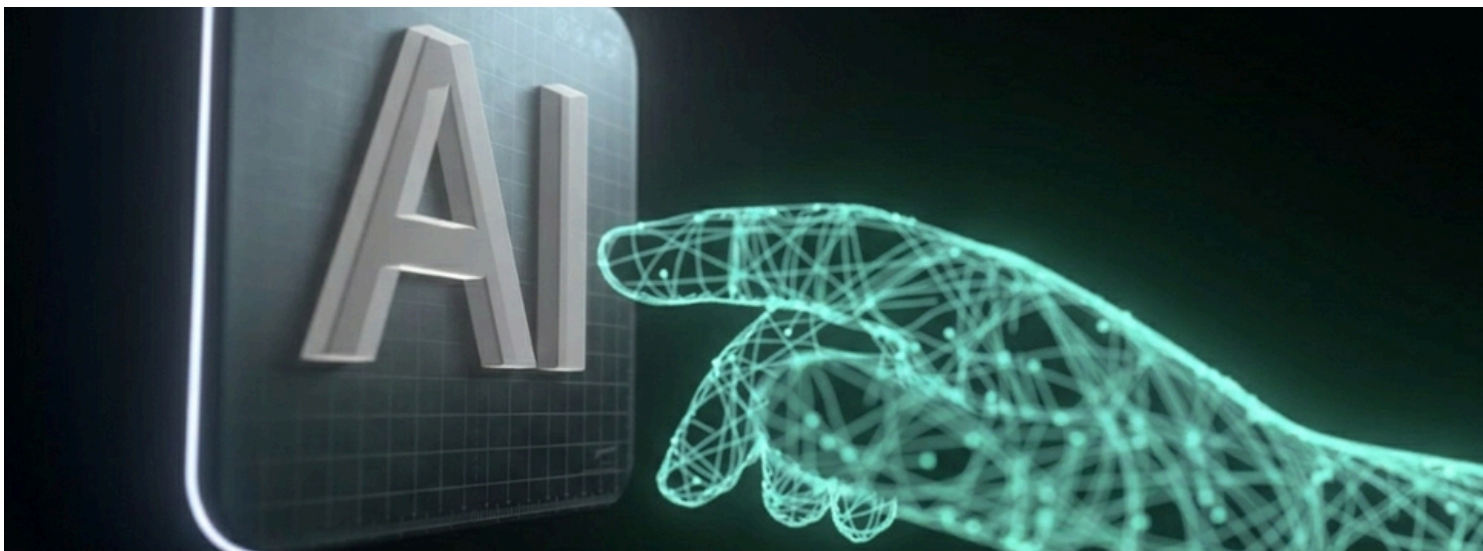
Leveraging CRM & AI

At UNION-MEDIC, artificial intelligence represents the next strategic step in their CRM evolution. The team has already started using Ask Nikola as a smart operational assistant, supporting users with instant guidance and step-by-step instructions directly within the system.

As their CRM adoption matures, the focus is now shifting toward expanding AI-driven capabilities that will further accelerate productivity and enhance decision-making.

Key priorities moving forward include:

- Advanced AI-powered sales analytics
- Intelligent data insights for faster decision-making
- Speech-to-text functionality to streamline visit reporting
- Increased automation to reduce manual input and administrative workload



UNION-MEDIC sees AI not as an add-on feature, but as a strategic enabler — one that will significantly reduce time spent on routine tasks and allow teams to focus on higher-value activities in the field.

Results & Benefits

System Evaluation

- ✓ Web-based and accessible anytime
- ✓ Adaptation without major adoption resistance
- ✓ Expectations largely met
- ✓ Strong collaboration and support

A Foundation built for growth

For UNION-MEDIC, one of the most valuable aspects of the new CRM solution has been the transition from fragmented, Excel-based processes to a centralized, web-based environment accessible anytime and from anywhere. The system created operational structure and visibility across field activities, while maintaining the flexibility required to adapt to local organizational workflows.

This combination of accessibility, transparency, and structured data management has strengthened day-to-day execution and provided a solid foundation for further analytical development.