

SUGARAI · FOR MEDICAL DEVICE COMPANIES

A CRM calibrated for medtech manufacturers

Medical device companies sell in a way most CRM systems were never designed for. The person who decides to use your product is a doctor. The entity that orders and receives the shipment is a site of care, and the same doctor works at several sites. And before you can ship a single unit, that doctor usually has to be trained and certified, with signed proof on file.

TCP builds on Sugar, a proven CRM platform, and shapes it around how medical devices are actually sold, shipped, and documented. Your reps get one place to run the relationship. Your operations team gets a system that will not release product to an uncertified site. And your quality team gets the signed records they need, tied to the customer instead of trapped in a folder.

Precision selling platform

Certification, built in

Built on a platform that does the work

SugarAI gives your team one place to run the customer relationship, with the platform handling the busywork so your people can sell.

One view of the doctor and the site of care

Every doctor, facility, order, interaction, certification, and usage record sits in one connected structure. A rep sees the doctor, every site they operate at, what they have ordered, and where they are in training — all in one place.

AR Dr. A. Reyes

DOCTOR

NPI1043... Sites 3 Stage Adopt

Insight that comes to you

SugarAI surfaces the accounts that are slipping, ranks your customers, and cuts the manual data entry that wears a field team down. Reps spend their time with doctors instead of updating fields.

AI INSIGHT

Northgate ASC has gone quiet — **no reorder in 74 days**

Automation that enforces your process

Build your steps in once and SugarAI runs them every time. A certification completes and the assigned rep is notified. A territory changes and the right records move.

STEP 1
Cert signed

STEP 2
Rep notified

STEP 3
✓ Shippable

Document generation built in

Generate a certification form, a training record, or a consent form straight from the record, already populated and ready to send for signature. A hand-typed form becomes one click.



Cert form



Training record



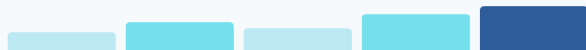
Consent form

Reporting and dashboards for every level

A rep sees their own quota and accounts, a manager sees their team, leadership sees the company — all from one source of truth, and a monthly review exports straight to a slide deck.

QUOTA MTD
\$820K

ATTAINMENT
92%



Works in the field

Reps work from a phone or tablet outside the OR, in a clinic hallway, or at a conference, with full access to their doctors, certifications, and numbers — and can log the visit on the spot.



Doctors, certs, and numbers
in hand, online or off.

Strong value

You get an enterprise-grade platform without the price tag of the biggest names, and a cost structure you can predict year to year. Where a per-seat signing or reporting license would be expensive, TCP finds the design that avoids it.



TIME TO PAYBACK

~6 months

Live in weeks, not quarters



Built for how medical device companies sell

This is where TCP shapes SugarAI around your business. These capabilities reflect how a device actually moves from your operation to the patient.

The physician is the opportunity

In a device business, the thing you develop over time is the doctor, not a one-off deal. TCP models the doctor as the record your reps advance through stages — from first assessment to trained, certified, and growing — so the pipeline reflects how they really sell.

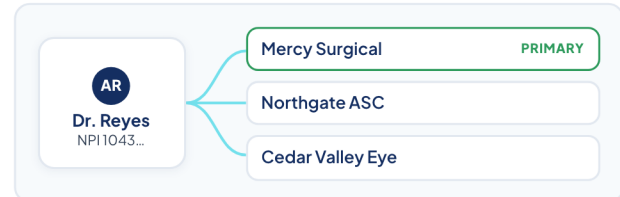
PHYSICIAN PIPELINE

Identify > Engage > Onboard > **Adopt** > Advocate

Dr. A. Reyes advanced with one click · stamped for reporting

One physician, many facilities

Many doctors operate at more than one site. TCP keeps one record per doctor, identified by their National Provider Identifier so identity never drifts, and links them to every facility they work at, with one flagged primary so revenue attributes correctly.



Facility and health-system hierarchy

Facilities roll up to parents. TCP models the hospital system, the multi-site surgery center group, and the private-equity portfolio that owns dozens of practices, so leadership can open a parent and see every site — and the revenue beneath it.

Mercy Health System

- 📍 Mercy Hospital
- 📍 Mercy ASC North
- 📍 Mercy Eye Center
- 📍 Northgate Surgery

PARENT

BILL-TO

SHIP-TO

SITE

SITE

Territory management by zip code

TCP loads a full zip-code-to-territory map — tens of thousands of zips — and assigns every doctor, contact, and facility automatically, tiered from five-digit zips in metros to two-digit in rural areas. A background job realigns ownership within minutes of a change.

ZIP → TERRITORY

Auto-assigned

787xx > South Central

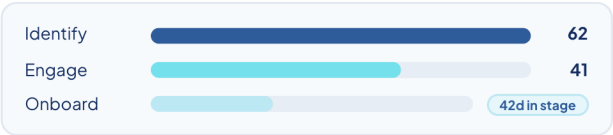
902xx > West

estimate ~32,000 zips mapped · realigns in minutes

Develop physicians, and measure the field

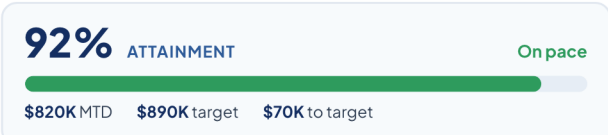
Physician development tracking

TCP builds your development funnel — for example Identify, Engage, Onboard, Adopt, Advocate — right onto the doctor. A rep advances with one click, every button shows the days spent in that stage, and every change is stamped for conversion reporting.



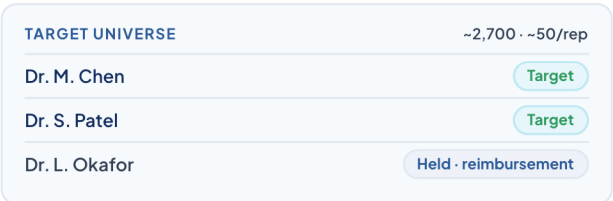
Real-time quota and attainment

TCP replaces the hand-kept spreadsheet with a live attainment view, updated within minutes of an order — month, quarter, and year to date, target, attained, run rate, and the dollars needed to reach pace and target, counting real selling days.



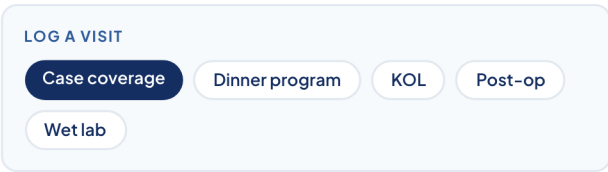
Target account programs

Field teams work a defined universe of high-value targets, not every physician. TCP loads that list, flags each target, and scopes every report to it. A target can be held in the universe but pulled from a rep's active list — for example, blocked until a reimbursement code takes effect — without losing it from the plan.



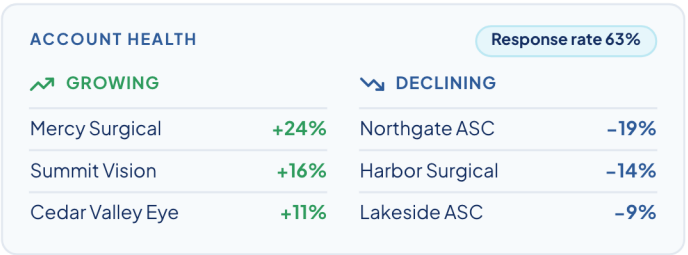
Field interaction logging reps will use

TCP strips the call log to a few tappable fields matched to how device reps engage a doctor — case coverage, dinner program, KOL engagement, post-op follow-up, wet lab. Every interaction rolls up from the doctor to the facility.



Account health, at a glance

Every account is classified growing, stable, or declining on a rolling 90-day basis, with the dollar change shown, so reps focus on meaningful moves among their biggest accounts. Usage response rate and reorder cadence come along for the ride.

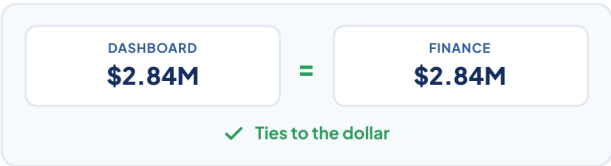


A revenue operations backbone

Revenue operations keeps territory design, quota planning, forecasting, and reported revenue lined up so the whole company works from the same numbers. TCP builds that backbone directly into SugarAI, so growth does not outrun the numbers.

One definition of revenue, everywhere

A single revenue-recognition report is the source of truth the attainment dashboards, commission numbers, and leadership reviews all run from. It counts only fulfilled orders and applies real discounts, so it ties to finance to the dollar.



Quota planning that behaves like a spreadsheet

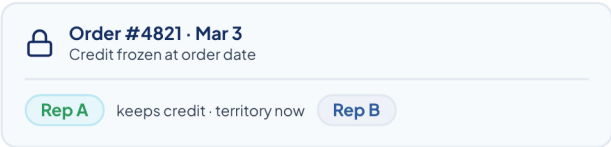
Leadership sets quotas in an editable grid that pastes straight from Excel — by rep, product line, and month — with yearly totals that roll up automatically, and the worksheet locked so reps see only their own target.

Rep	Jan	Feb	Mar
Reyes	210	220	230
Chen	180	190	195
Total	390	410	425

Pastes from Excel - totals roll up automatically

Commission accuracy built in

Order credit is frozen to the rep who held the territory at the time of the order, and is never retroactively reassigned when territories change later. This one decision is what keeps commissions correct through a realignment.



Data integrity as revenue protection

Scheduled red-flag reports surface orders with no territory, orders whose owner does not match the facility's current owner, and facilities with orders but no address or zip — before they reach the board.

RED-FLAG REPORT		Daily
✓ Orders with no territory		0
⚠ Owner mismatch		2
⚠ Facility missing zip		1

Certification, built into the sale

For a device company, the equivalent of an export-control program is the requirement that a physician be trained and certified before using your product, with documentation that stands up to an FDA audit. TCP makes certification part of the sale instead of a side process.

Certification tied to doctor, product, and site

A certification record links a doctor to a specific product and the sites it covers — training type, IFU review, procedures observed, dates, and an automatic days-to-certification. A doctor can be certified on one product and still training on another.

Dr. A. Reyes · Glaucoma Stent X

CERTIFIED

Sites 2 · IFU Reviewed · Days to cert 21

Ship only when certified — no faking it

Operations will not release product to a site unless a certified doctor is there. TCP surfaces certification status on the location and makes the certified flag read-only, set only when the signature process completes. A rep cannot tick a box to get product out the door.

✓ Mercy Surgical

SHIPPABLE

✗ Cedar Valley Eye

HOLD

🔒 Read-only · set only on signature

One-click form and e-signature

One button merges the training record from data already in Sugar and routes it to the trainer, then a document-control signer. It runs without a per-rep license, on a service costing cents per signature, and the signed document files back automatically.

FORM Merged

>

TRAINER Signs

>

DOC CONTROL Filed

Full visibility into every signature

A status board shows every certification and consent document and exactly where it is, with resend and a recovery view so nothing gets silently stuck.

48 Sent

31 Viewed

26 Signed

3 Expired

An audit trail built for quality and FDA

Because certification lives in the CRM rather than a document folder, every field, signature, and status change is recorded and reportable. When quality or an auditor asks who was certified, on what, when, and by whom, the answer is a report — not a search through email.

✓ Certifications on file	312
📄 Signatures captured	628
🕒 Status changes logged	1,904

NOTE SugarAI and TCP give your team the tools to apply your training and certification policies consistently and keep clean, signed records — your quality and regulatory program, and final responsibility for it, remains with you.

Connected to your commerce and ERP

A device company runs on more than a CRM. TCP connects SugarAI to the systems where orders and revenue live: your commerce platform, your physician-targeting and claims tools, and your marketing platform, all matching on the National Provider Identifier so records line up cleanly. Orders sync within minutes as line-item revenue, counting only fulfilled orders so the numbers match finance to the dollar.

For device companies that run a manufacturing ERP, TCP integrates SugarAI with the major systems so accounts, parts, quotes, orders, shipments, and invoices flow between the two. Our Fluent integration tools connect SugarAI to your ERP with a depth and speed that come from years of focused work.



WHY TCP

A team that builds, not just configures

TCP is a team of expert Sugar consultants who build, not just configure. When a device company needs the CRM to do something a standard system can't: model the doctor as the opportunity, block a shipment until a certification is signed, keep commission credit with the right rep through a territory change, we build it. We know the device sales model, we know SugarAI, and we know how to connect it to commerce and ERP. And we stay close, shipping real improvements from the questions your team actually asks.

Ready to see it?

Talk to TCP about a CRM built for how medical device companies sell to physicians, ship to facilities, and document every certification.

[Book a conversation →](#)