



Transforming Behavioral Health With the Help of a CRM Platform

RethinkFirst, a leading behavioral health technology company, uses Salesforce to manage and optimize nearly every aspect of its business

Imagine creating tools that make it easier for a caregiver to help a child with a significant disability say, “I love you” for the first time. While some companies call themselves “life-changing,” RethinkFirst, a behavioral health technology company, embodies the principle by using software platforms and technology solutions to improve outcomes and support behavioral and mental health needs. The goal: work with school systems, employers, clinicians, and managed care organizations to deliver tools that help people and organizations reach their full potential.

RethinkFirst is a “double-bottom-line” business, meaning that it measures both financial performance and social impact. CEO Daniel Etra co-founded the company

in 2007 to address “the dearth of clinical resources” in the behavioral health marketplace. Since then, RethinkFirst has expanded into new markets and achieved double-digit percentage growth year over year, growing from five to more than 300 employees. Etra credits Salesforce’s customer relationship management (CRM) platform with helping the company manage such growth.

A clear path to success

Before Salesforce, life was “like the ‘Dark Ages,’” Etra says. The team used spreadsheets to manage sales data and lacked real-time access to data. In 2014, the company adopted Salesforce, giving the team a centralized location for managing data for its various types of customers. In a click or two, Etra and his

team can get a macro view of company performance or zoom in on a market or client.

Lizanne Kiel, executive vice president, SMB sales at Salesforce, says that providing a 360-degree view of customers enables businesses like RethinkFirst to “drive success, innovation, and an incredible customer experience.” Additionally, the platform automates tasks and boosts employee productivity. For example, after RethinkFirst Digital Marketing Manager Sean Wachtel created Salesforce dashboards for sales and customer success managers, they were able to get the information they needed from the CRM instead of asking him. Salesforce’s CPQ, which streamlines quote generation and improves accuracy, speeds up sales cycles. Clients can approve the quote, sign the contract, and begin the same day. “It’s really expedited our fulfillment process, and customers love it,” Wachtel says.

Built to support next stages

RethinkFirst continually optimizes processes and connects systems to make it easier to manage and improve customer experiences, Etra says. The business adopted additional Salesforce offerings, including Heroku, a platform-as-a-service that makes it easy for businesses to build and manage their own apps. The company also uses Marketing Cloud Account Engagement, which automates marketing and lead generation, and Salesforce Shield, an encryption software that helps boost cybersecurity.

RethinkFirst works with customers across the behavioral health ecosystem. With Salesforce’s help, it uses data from its various platforms and solutions to connect the dots between school, health care, and home settings to create a more holistic approach to care. This comprehensive view gives the company a unique opportunity to improve behavioral health care and expand into international markets.

“Salesforce is so much more than a CRM solution—we are a platform that will pivot with RethinkFirst as the company continues to evolve and grow,” Kiel says. ■

RethinkFirst is growing with healthcare tools that wow.

Everyone deserves the best care possible – and with cloud-based treatment tools for individuals with developmental disabilities and their caregivers, RethinkFirst is making the right care more accessible. With Salesforce, the company has a single, 360-degree view of every customer to provide individualized support at scale.



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