

SOLUTION STORY

BACKGROUND

This healthcare customer is directed by the Catholic Church to care for those most in need. They are dedicated to holistic care and are advocates for a compassionate and just society.

CHALLENGE

This customer sought out PowerObjects to help implement Microsoft Dynamics CRM Online for a single Health Division that would support 150 internal users, and potentially thousands of external portal users, that would access the system through a customer portal in order to update or verify contact information. Additionally, this portal would be used by vendors and participants to maintain their own information. The scope of the solution included account management for companies, participants, and vendors to use as well as a number of items for the organizational CRM users—including contact and opportunity management; sales process workflows; marketing and campaign management; case management; queue management; and overall activity management (for e-mails, tasks, phone calls, faxes, appointments, and letters).

SOLUTION

This customer utilizes ADFS technology with Dynamics CRM within the organization. Dynamics CRM is used for participant development as well as for selling GPO services to entities outside of the organization for services (basic case management). The customer needed a platform that would allow for a single sign-on configuration to help limit the time employees spent logging into Dynamics CRM. PowerObjects also configured an e-mail router and plugin to automatically take e-mail attachments and store them within SharePoint.

BENEFITS

This customer utilized other Microsoft technologies to integrate into CRM, including the Outlook integration for their staff as well as a SharePoint integration for document management. The customer also utilized many of PowerObjects' PowerPack add-ons to enhance their CRM system. These included PowerGlobalSearch, PowerOneView, PowerSurvey, and PowerMailChimp for marketing efforts.

CATHOLIC HEALTHCARE
PROVIDER UTILIZES
DYNAMICS CRM AND
ADFS TECHNOLOGY TO
ENHANCE THEIR
CUSTOMER PORTAL

AWARDS + RECOGNITION

2012 + 2013 + 2015
Microsoft Dynamics Partner
of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft
Dynamics

+++

2009 + 2010 + 2011 + 2012
Inner Circle for Microsoft
Dynamics

+++

3
Convergence Customer
Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft
Dynamics



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612.339.3355 | 866.770.3355
powerobjects.com