

SOLUTION STORY

BACKGROUND

Through innovative research, hearing loss awareness programs, and outstanding service, this cutting-edge hearing device seller offers the opportunity for better lives through better hearing. This organization offers a multitude of available digital technology resources to draw upon when determining which solution is best for their clients.

CHALLENGE

The customer was seeking leverage in a CRM system that could support the lead generation process for their Minnesota-based call center. At the time of their evaluation, their current processes were archaic and involved numerous steps that had to be done manually. This resulted in multiple lost opportunities and frustrations from both clients and employees alike. Initially, the customer was utilizing Excel to track and assign leads for calls and follow-ups. This approach cost them opportunities and also added a level of complexity to the job which caused some internal dissatisfaction.

SOLUTION

The customer ultimately chose Microsoft Dynamics CRM due to its ability to automate the lead capture, assignment, and follow-up processes. In addition, the customer wanted the ability to have a 360-degree view of their clients. With their old system, this was not possible, and as such, required the use of logging into different applications or referring to multiple files to gather the information necessary to provide accurate client information during a call. This not only added unnecessary time to the call, but was not optimal for providing a great customer service experience.

Campaign tracking was a huge need for the organization. They wanted to be able to track the different marketing campaigns they used and the cost versus ROI. Previously, this was difficult to capture, but with Dynamics CRM, it became seamless.

Reporting was also made easier for managers and sales reps. Commissions were difficult to calculate and track based on the metrics they were using previously, however, since this can be easily tracked in CRM, it is no longer an issue for the organization.

BENEFITS

The CTI implementation was an added bonus for the call center. It reduced training time and gave them the ability to tie phone numbers to campaigns and leads, thereby allowing representatives to easily access lead and contact records if they were in the system.

This customer was very engaged in the process and approached PowerObjects as a referral through a current implementation with a parent company. This was a brand new implementation for this customer.

HEARING DEVICE SELLER

*UTILIZES CRM FOR
AUTOMATING THEIR*

*LEAD CAPTURE,
ASSIGNMENT, AND*

FOLLOW-UP PROCESSES

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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BENEFITS |CONTINUED|

PowerObjects implemented an On-Premise version of Dynamics CRM 2011 for this customer that was fully integrated with their current providers and their phone system, a CTI integration with Cisco. The CTI integration to the phone system utilized screen pops for incoming client calls. The integration is utilized for the provider's applications. Web Form integration to the customer's website was also implemented.

The customer is utilizing Marketing, Salesforce Automation, and a customer interface within Dynamics CRM. The marketing solution is used to create marketing lists and activities to promote to their clients and potential clients. The organization also uses the sales functions within CRM for lead generation and for managing their leads, contacts, and opportunities. Additionally, their custom interface allows for easy access to their integration system, Hearing Fusion.

Overall, the solution from a CRM standpoint was to use the platform for lead generation, reporting, and integrations with the customer's providers. The project took approximately six months.



ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life sciences, insurance, financial services, publishing, distribution, manufacturing and professional services.



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