

SOLUTION STORY

BACKGROUND

This organization develops products for the healthcare industry.

CHALLENGE

This customer was searching for a new technology platform due to growth within their business. They needed a technology platform that could provide their sales team with true customer centric technology instead of the current spreadsheet-based solution they were currently using. After reviewing multiple customer focused platforms, the customer selected Microsoft Dynamics CRM and PowerObjects as their partner.

SOLUTION

PowerObjects spent two months with the customer working on mapping out functionality, implementing the system, and training. The customer had two focuses for their CRM implementation. The first was improvements to their sales force automation and the second was for service case use. Additionally, they wanted to integrate Microsoft NAV into their CRM system to help link data to provide better estimates for sales.

The customer has seen improved sales visibility with Dynamics CRM. Now their sales team can utilize accounts, contacts, activities, and opportunities to better close deals and have insight into their pipeline. Sales teams are now tracking activities to accounts and contacts, which is an important piece of functionality as the sales reps are compensated on a number of these activities.

Another improvement since the implementation of CRM has been in their service department. The customer now has a streamlined process for internal tickets along with increased visibility into their sales and IT ticketing processes. They moved what was once a manual process into CRM, where they can now be more agile with internal tickets.

BENEFITS

The customer had PowerObjects integrate their Dynamics CRM system with Microsoft NAV using Scribe. This integration helps the customer share data that can help in generating estimates for potential opportunities in CRM.

A few months after PowerObjects helped with the initial implementation of CRM for the customer, the new version of Dynamics CRM was released. The customer decided they wanted to upgrade so they could take advantage of the product enhancements and updated user interface. With the upgrade, the customer was able to enhance the new functionality with little to no changes. Additionally, PowerObjects provided user training to 300 users on the new interface and functionality.

The customer can now utilize CRM in the way that they originally intended. The customer is currently utilizing CRM for sales force automation, service, scheduling, click dimensions, and portals.

HEALTHCARE PRODUCT
DEVELOPER UTILIZES
CRM FOR ITS CUSTOMER
CENTRIC FOCUS AND
CAPABILITIES.

AWARDS + RECOGNITION

2012 + 2013 + 2015
Microsoft Dynamics Partner
of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft
Dynamics

+++

2009 + 2010 + 2011 + 2012
Presidents Club for Microsoft
Dynamics

+++

3
Convergence Customer
Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft
Dynamics

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