

SOLUTION STORY

BACKGROUND

This customer is a non-profit health plan provider.

CHALLENGE

This customer engaged with PowerObjects in order to implement their Dynamics CRM solution for a number of internal groups. PowerObjects worked on a tight deadline to make sure their system was in place and ready to support the customer's internal sales and marketing deadlines.

The customer needed to move off of their internally-developed lead and member management system that previously managed many of their business processes. Their proposed solution was to implement Dynamics CRM to replace and enhance the functionality previously provided by their legacy system. While replacing the entire legacy system was one of the goals, the focus of the project was on the core processes for the sales and marketing groups. Replacement of the old system and functionality for other groups will be left for Phase II.

SOLUTION

Phase I of the implementation was primarily focused on inside sales, direct sales, sales relationship managers, and marketing groups. PowerObjects assisted the customer with their system architecture and infrastructure design as well as provided implementation guidance. The organization deployed their CRM on-premises to three separate environments. Dynamics CRM was integrated with a total of nine other technology platforms that included Oracle, a member database, an event system, a lead list system, and a few other internal data sources, using SSIS.

For the Phase I rollout of their CRM system, the customer wanted a true sales automation process, as they were utilizing leads, contacts, activities, and campaigns heavily.

The customer uses leads and contacts to sell to new businesses. They use a custom built entity that attaches to contacts like an opportunity so they can track what a certain individual is interested in service-wise. They also use the out-of-the-box contact entity to track all prospect and member information. This makes it easier for the organization to search something within the system. Additionally, the customer utilizes a round robin lead assignment process. When the lead list is imported, the sales manager can choose a round robin workflow which will assign each lead a sales representative as the owner. Leads are assigned equally to all sales representatives who are members of the defined team. If they need to, the sales manager can re-assign leads.

BENEFITS

This customer is utilizing a number of other workflows to help with their business processes. These workflows include lead status automation, zip code automation, and contact preference tracking. A custom button for qualifying leads was created and the out-of-the-box button was hidden from the user's view. Now when a user clicks on the new custom button, a plug-in will check to see if there is already a value in the contact field. The plug-in also refrains from creating an opportunity, but instead creates a record in the custom entity attached to the contact. This will help ease the qualification process for the organization and ensure proper information is recorded for leads.

NON-PROFIT HEALTH

PLAN PROVIDER

LEVERAGES CRM TO

ENHANCE THE

FUNCTIONALITY OF

THEIR CORE PROCESSES

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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BENEFITS [CONTINUED]

A custom complaints entity is also used, which allows sales relationship managers to track complaints regarding agents and agencies in CRM. The customer heavily uses activities within CRM, and the marketing team is using CRM to track campaigns. By tracking campaigns in CRM, the customer's marketing team can see the ROI associated with those campaigns while also tracking leads and prospects as they progress through the sales cycle.

The customer rents several lead lists that have expiration dates. The expiration dates are typically one year, so now with Dynamics CRM, when a list is imported, the expiration date field will be imported as well. On a scheduled basis, an SSIS job will find all of the leads that have an expiration date and set those to inactive.

The other large component of the Phase I rollout was the data migration from their legacy system to Dynamics CRM. All of their valuable and historical contact and sales data needed to be migrated. PowerObjects helped map out the data migration, which was executed through tools that were already available to the customer's team.

With a successful and timely implementation of Phase I, this customer will continue to rollout Microsoft Dynamics CRM functionality with the help of PowerObjects. Phase II will consist of telephony integration, mobile integration, quoting, receipt filing, and additional marketing functionality.



ABOUT POWEROBJECTS

PowerObjects, an HCL Company, is a professional services firm 100% focused on providing service, support, education and add-ons for Microsoft Dynamics CRM.



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