

## ABOUT THE ORGANIZATION

Arbor Memorial is an industry leader in providing responsive, respectful and meaningful end-of-life products and services to the Canadian community. They are committed to helping families remember and pay tribute to loved ones by providing professional and ethical guidance, innovative customer-focused service and pre-planning solutions.

## SITUATION

Arbor Memorial was coming to the end of a three-year contract with Salesforce.com and they wanted to explore alternative CRM solutions that could save them time and money as well increase their user adoption rates.

PowerObjects, an HCL Company was recommended to Arbor directly by Microsoft. Since Arbor was already utilizing other Microsoft products in their business, it was in their advantage to look at the CRM solution that Microsoft would be able to provide and support, as well as one that would integrate with their existing suite of Microsoft products.

“When we started the discussion about other CRM partners, Microsoft told us, ‘Here’s PowerObjects. You should use them,’ ” says Jeff Hum, Senior Manager, Digital and CRM Marketing at Arbor Memorial.

## CHALLENGE

Arbor Memorial was experiencing challenges with the Professional Salesforce.com licensing model they were using. Due to limitations with some of the functionality included within the professional license, their previous partner was not able to execute or develop Arbor’s instances without an enterprise license, which was a considerably more expensive licensing structure.

CRM was being primarily utilized by Arbor’s sales staff. Arbor received feedback from the field on their main concerns with Salesforce, and what they ultimately wanted in another CRM system was one that was more user friendly and would result in them spending less time in front of a computer and more time meeting with families. Essentially, Arbor needed a system that was easier to use, with simplified methods for their business processes.

## SOLUTION

Arbor Memorial was able to get all the functionality they needed with a Microsoft Dynamics 365 professional license, without seeing an increase in cost. “With Dynamics CRM/365, there aren’t any hidden licensing structures,” says Jeffrey Loretta, Arbor Memorial Marketing CRM Specialist. “They’re much more aligned with our needs, having no tiered licensing structures or models.”

With a sales team of over 450 spread across Canada at approximately 40 locations, Arbor needed a CRM solution that would move with them. Now, all of Arbor’s sales representatives are on Surface Tablets with Office 365.

After the implementation, Arbor’s end users were able to train and adapt to the new system with positive results. “It became so easy for our team that they were kind of like, ‘This is it?’ They expected a little more, because with Salesforce they



*ARBOR MEMORIAL  
WORKED WITH  
POWEROBJECTS TO  
SWITCH FROM  
SALESFORCE.COM TO  
CRM FOR MICROSOFT  
DYNAMICS 365*

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*"I've noticed that a lot of other departments are starting to catch wind of the CRM fever," says Loretta. "They are starting to ask, 'Hey maybe CRM can do this for me?' It's a really exciting time here, and should be for years to come."*

**JEFFERY LORETTA**  
Marketing CRM Specialist  
Arbor Memorial

## SOLUTION |CONTINUED|

had to go through such a process to convert a lead to prospect or to book an appointment," says Loretta. "It was just so easy with Dynamics that they weren't used to it. User adoption has already surpassed where it was with Salesforce."

PowerObjects helped Arbor Memorial clarify and define their key internal sales processes at the beginning of the project. With PowerObjects' guidance and expertise, Arbor was able to develop what the final system would look like, see what functionality the system had out-of-the-box, and discuss how to make it as easy and user friendly as possible.

Additionally, Arbor uses PowerObjects' PowerPack Add-on, PowerWebForm to aggregate, track, and market to new leads. With this data, Arbor is able to track how many web forms website visitors are completing before they get in contact with an Arbor representative.

PowerWebForm is also a critical component of Arbor Memorial's referral processes. Arbor operates as two separate business units, a funeral division and a cemetery division. The cemeteries rely on referrals coming in from their funeral homes across the country. Before Dynamics 365 and the use of PowerWebForm, this referral system was a manual process. Arbor had to assign someone to populate and create the new contact referrals in CRM. An email would be sent to that person whenever a referral would come through. They in turn would have to go in to manually create the contact in CRM and assign it to the appropriate branch manager.

Now the process is automated. Funeral homes enter information directly into PowerWebForm where it can be assigned to the correct Cemetery manager within CRM. "We've had about 4,200 referrals come through with PowerWebForm so far and we've probably cut our referral process time in half," says Loretta.

Arbor also uses PowerAttachment, which has saved them about 14 GB in storage from direct email attachments. With PowerAttachment, all email attachments are uploaded to CRM and attached to the appropriate contact record, where Arbor's sales representatives can review before customer meetings.



## CHALLENGE

Arbor Memorial needed to increase productivity for their sales team and was experiencing challenges with pricing and functionality with the Professional Salesforce.com licensing model they were using.

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## BENEFITS

- + Arbor now receives better business intelligence, better data, and better reporting metrics than with Salesforce.
- + Sales representatives can now easily take a lead directly through the sales process by eliminating the entire lead conversion step.
- + Arbor now manages their CRM within the marketing division, who use CRM extensively to drive marketing efforts.

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## BENEFITS

With Dynamics 365's professional licensing structure, Arbor now receives better business intelligence, better data, and better reporting metrics than with Salesforce. With this data, Arbor is informed so that they can make budget decisions, allocate funding appropriately, and ultimately measure the success or failure of marketing campaigns.

Arbor Memorial's sales team has seen extensive benefits with Dynamics 365. Sales representatives can now easily take a lead directly through the sales process. They were able to eliminate the entire lead conversion step and now work exclusively with a single entity, contacts, rather than working with both leads and contacts. "To us, a person is a person. As long as they are willing to have a conversation with us, then everyone is classified the same in CRM," says Loretta. "We saw a lot of benefit out of that."

Additionally, Arbor manages their CRM within the marketing division, who use CRM extensively to drive marketing efforts. "Lead source is huge. We're creating marketing leads for the sales reps where we're able to identify exactly where leads are coming from," says Loretta. "It's really the data that's being represented in CRM that's driving how we spend marketing dollars."

"Any instance where we spend dollars corporately to generate a lead that lead goes into CRM," says Hum. "We then key that into the system and it gets assigned to the appropriate branch based on location. From there, the manager at that particular cemetery or location can pass it out to his or her sales reps accordingly."

Moving forward, Arbor Memorial plans to integrate their existing contract management system with Dynamics 365. "I've noticed that a lot of other departments are starting to catch wind of the CRM fever," says Loretta. "They are starting to ask, 'Hey maybe CRM can do this for me?' It's a really exciting time here, and should be for years to come."



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