

ABOUT THE ORGANIZATION

United Wound Healing (UWH) provides team-centered wound care, a unique teamwork model that allows the organization to work side-by-side with skilled nursing, assisted living, and family home caregivers on weekly wound rounds. Together, UWH teams work to enhance patient care while decreasing costs, reducing staff paperwork, improve quality outcomes, and increase compliance with federal regulations.

SITUATION

As a relatively new organization, United Wound Healing wanted to get started on the right foot when building their customer base and managing their accounts. They knew they needed a CRM platform that could handle the various aspects of their business operations and provide a central database for account management.

“We had a directive to build the company as if we were five years in the future,” says Chris Sherrett, Chief Operating Officer at UWH. “Based on our growth goals, we needed a data management system—a way to have insight into all our accounts, how often we touched them, and what resources they needed from us.”

In initial talks with PowerObjects, Sherrett was given a vision of how CRM could be used at UWH to build out a customer base and have a single database of information on all their accounts.

“We knew we didn’t want to live in Excel,” says Sherrett. “We wanted to centralize a lot of automation—to maintain a human factor but simplify our efforts.”

SOLUTION

After researching CRM platforms and partners to provide CRM services, UWH chose to work with PowerObjects, an HCL Company, to implement the CRM functionality of Microsoft Dynamics 365.

“We wanted Microsoft for its modularity,” says Sherrett. “We like that it could be compatible with our model and that we could tailor our needs to meet our model requirements—that was very profound for us.”

They also enrolled in PowerSuccess, a service-as-a-subscription program that allows organizations to implement CRM solutions while avoiding the costs of a traditional time-and-materials project. PowerSuccess allows organizations to work directly with a dedicated Success Engineer to understand business requirements, develop a plan for success, implement CRM, train users, and provide ongoing adjustments to the system.



UNITED WOUND HEALING

WORKED WITH
POWEROBJECTS TO
IMPLEMENT A CRM
SYSTEM THAT COULD
GROW WITH THEIR
COMPANY.



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"I'm an ethics-based decision-maker, so to have someone say we didn't need to spend all our money on a CRM system—that alone made me want to do business with PowerObjects."

CHRIS SHERRETT
Chief Operating Officer
UWH

BENEFITS

PowerSuccess

Enrolling in the PowerSuccess program has been one of the major factors of success for UWH's CRM rollout. Through PowerSuccess, UWH has one single point of contact for all CRM-related issues who knows the system inside out.

"We have a consultant that works with us, understands our company, and is part of our family," says Sherrett. "Our Success Engineer essentially lives inside our company. He helps us understand our capabilities within the CRM system, knows how to build things out, and shares best practices or lessons from their experiences with other organizations."

When something in CRM isn't working as intended, UWH can reach out directly to their PowerSuccess engineer.

"We know that if we have an issue, we can call and say 'Hey, this aspect of our system isn't functioning as intended and we need to look at it from a different angle,'" says Sherrett. "He already knows what we're talking about. We don't have to spend hours upon hours educating someone about our system. I can't overstate that value."

Scalability and Planning for the Future

In the beginning of UWH's CRM rollout, the organization explored and modeled all the capabilities that Microsoft Dynamics 365 could offer and how the company could use them in the future.

"What I really appreciated about this modeling was that we didn't live in the here-and-now of CRM, we lived in the future," says Sherrett. "We didn't build it based on the accounts we had—we built it based on projections of growing into different territories, regions, and time zones."

UWH's Success Engineer continues to help shape their CRM with the future in mind.

"He is always thinking about the next step," says Sherrett. "It's very beneficial because he comes to the table already having a clear understanding of where we should be headed in our system. That's a big deal for us because none of us are super users, so we have to learn it along the way."

PowerPack Add-ons

UWH uses several of PowerObjects' PowerPack add-ons for Dynamics 365 to enhance functionality, including PowerMailChimp, PowerSurveyPlus, PowerMap, PowerCalendar, PowerWebForm, and more. These pre-built solutions are all available to



CHALLENGE

United Wound Healing was a start-up with ambitious growth goals, and they needed a platform to help them manage their data and scale with their projections.

SOLUTION

United Wound Healing worked with PowerObjects to implement a CRM system using Microsoft Dynamics 365. They also enrolled in the PowerSuccess program.

BENEFITS

- + One platform for getting all account, contact, and prospect data in one place
- + An automated sales process entirely built in CRM
- + Dashboards that provide business intelligence into the health of daily operations



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BENEFITS |CONTINUED|

PowerSuccess customers at no extra charge, and can be easily installed at any time. “Having our Success Engineer help us decide whether we’re going to use this Power-Pack or that PowerPack, it’s been great.” Says Sherrett. “We love them.”

Sales Process

UWH has a detailed but effective sales process that is built out entirely in CRM. After the initial research into a target account, everything is tracked in UWH’s CRM system. This starts with an “M1”—a physical interaction where a representative makes an in-person introduction and drops off marketing materials. From there, the prospect is given a heat signature, and it’s determined whether or not it will be qualified.

If a prospect is not qualified, CRM sends an automated reminder to re-nurture it in 90 days. If it is qualified, the system is designed with strict time protocols to get in touch with the prospect. Every point in the sales process is built in the system, helping UWH build a timeline for working accounts. It also provides insight into how long opportunities have been in the system.

“When it comes to our sales process, CRM really helps us maintain an awareness of where we are so that we don’t lose an opportunity through negligence,” says Sherrett. “It also helps us monitor if we’re touching an account too much.”

Dashboards

UWH uses Microsoft Dynamics 365 charts and dashboards to get high-level snapshots and detailed views of day-to-day operations. With the help of their Success Engineer, UWH can effectively use dashboards to monitor and better predict business health and plan for growth.

“When it comes down to it, we’re a dashboard company,” says Sherrett. “We love to see where we sit every day. Having dashboards that talk about how many prospects we are working, how many contracts we’ve procured this month, are we reaching our goals—those are the things that are very important to us because we’re trying to grow.”

The PowerObjects Relationship

Overall, UWH benefits from an ongoing relationship with PowerObjects as a whole as well as their dedicated Success Engineer. They can reach out at any time with questions, but also have regularly scheduled meetings to check in and reassess priorities.

“When we went through exploration with PowerObjects, they told us we didn’t need all this stuff right now—we can build as we go,” says Sherrett. “They said, ‘You’re a start-up and you need all the money you can in growing your business. Here’s another way we can do this.’ I’m an ethics-based decision-maker, so to have someone say we didn’t need to spend all our money on a CRM system—that alone made me want to do business with PowerObjects.”



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