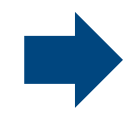


# Large US Senior Living Company Moving From Reactive to Proactive Sales and Customer Engagement



## Challenge:

A very large US senior living company will be upgrading their Sales Applications with a new and improved user interface, features and functionality. Their challenge is a poor user experience with the current system. Their sales teams needed to log into multiple applications to get the necessary information to build relationships and drive pipeline. Since they need to upgrade their CRM system, they would like to simultaneously improve the user experience for their national and global sales teams to increase sales activity performance, measured by win ratios, across their hundreds of communities.



## Solution:

The company partnered with Neudesic for the license renewal to upgrade Dynamics 365 rather than moving to the Salesforce platform. Neudesic conducted a 4-week in-depth discovery phase to understand their business model. They that the core business model is building relationships with their leads and pipeline at all levels.

Based on the discovery phase, Neudesic created a robust sales application with a lot of functionality, such as the daily dashboard for users to login and see all their leads, opportunities and activities in one place.



## Business Outcomes:

As a part of this engagement, Neudesic upgraded the Dynamics 365 Sales Application to align with their business priorities:

- Improved the usability by both modernizing and simplifying the tracking of communication with customers,
- Improved win ratios by guiding sales leaders on next best activities
- Used out-of-the-box tools to build simple workflows that model the sales process
- Designed workflows that lead to improved consistency and accuracy of data captured
- Improved the ability to pull and share data for lead sources and for internal trend analysis and predictive behavior studies



## ABOUT

Industry: Hospitals/Healthcare

Microsoft Segment: Enterprise Major HLS

Region: Northeast

Technologies in Focus: D365 Sales, Customer Insights, Power Platform

## BUSINESS OUTCOME HIGHLIGHTS

### Up to 50%

Increase in Success Rate with Targeted Marketing and Sales Campaigns

### Up to 80%

Reduction in Data Entry Issues