

CLIENT INFORMATION AND BACKGROUND

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.

Arbor implemented CRM for Dynamics 365 with PowerObjects, an HCL Company as their implementation partner. 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. They were able to get all the functionality they needed with Microsoft Dynamics 365.

With a sales team of over 450 spread across Canada at approximately 40 locations, as well as numerous cemetery locations. Arbor needed a CRM solution that would help them manage their referral process as well as manage the plethora of documents and email attachments their sales representatives dealt with on a daily basis. The solution was to use PowerObjects' CRM PowerPack Add-ons for Dynamics 365.

MANAGING REFFERALS WITH POWERWEBFORM

[PowerWebForm](#) is a critical component of Arbor Memorial's referral processes. Arbor operates as two separate business units, a funeral division and a cemetery division. The cemetery partners 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. To date, Arbor has received approximately 4,200 referrals come through with PowerWebForm and they've cut the referral process time in half.

STREAMLINING EMAIL ATTACHMENTS WITH POWERATTACHMENT

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.



POWERPACK CRM ADD-ONS

PowerObjects' PowerPack Add-ons are tools designed to help enhance the CRM capabilities of Microsoft Dynamics 365, while providing even greater functionality and efficiency. All for just \$1-2 per user, per month.

HOW DO I GET STARTED?

1. IMPORT
2. REGISTER
3. CONFIGURE

Try any of our PowerPack Add-Ons FREE for 30 days. Visit our website to learn more:

[PowerObjects.com/powerpack-add-ons](https://powerobjects.com/powerpack-add-ons)



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