

ABOUT THE ORGANIZATION

The Center for Creative Leadership (CCL®) is a top-ranked, global provider of leadership development. By leveraging the power of leadership to drive results that matter most to clients, CCL transforms individual leaders, teams, organizations and society. Our array of cutting-edge solutions is steeped in extensive research and experience gained from working with hundreds of thousands of leaders at all levels. Ranked among the world's Top 10 providers of executive education by Financial Times, CCL has offices in Greensboro, NC; Colorado Springs, CO; San Diego, CA; Brussels, Belgium; Moscow, Russia; Addis Ababa, Ethiopia; Johannesburg, South Africa; Singapore; New Delhi-NCR, India; and Shanghai, China.

CCL derives funding primarily from tuition; product sales and publications; royalties; and fees for services. In addition, CCL seeks grants and donations from corporations, foundations, and individuals in support of their educational mission to advance the understanding, practice, and development of leadership for the benefit of society worldwide. Through this funding, CCL annually serves more than 30,000 individuals and 2,000 organizations including more than 80 Fortune 100 companies across the public, private, nonprofit, and education sectors.

CHALLENGE

CCL needed a unified platform that could scale with their organization and allow their sales and marketing teams to work more efficiently. The platform also needed to be customizable to support their sales and marketing efforts and improve their current process of tracking and analyzing leads through their multiple sales processes.

CCL partnered with PowerObjects in 2015 when they decided to implement Microsoft Dynamics 365 for Sales. Dynamics 365 for Sales' features and functionalities (dashboards, lead and opportunity tracking, etc.) and its seamless integration with LinkedIn Sales Navigator and other Microsoft solutions, enabled CCL to align their sales and marketing teams.

SOLUTIONS

Leveraging Dynamics 365 for Sales dashboards, CCL created custom views to empower sales users to review their leads, active accounts, open opportunities, and to set and track revenue goals. Dynamics 365 for Sales also provides a high-level overview for sales managers to efficiently track their team's performance in a clean, easy-to-read interface.

"The ability for people, both users and managers, and top management, to be able to see the data that they need displayed in one spot is unbelievably valuable," says Wendy Perrigo, Director of Sales Learning and Resources at CCL.

Additionally, CCL's marketing dashboards provide an overarching look at qualified leads. This allows the team to view how individual leads were generated and track their journey through the sales process.

With the help of PowerObjects, CCL was not only able to build a better process of tracking leads, but gained additional insight behind the data, helping them produce more qualified leads. CCL implemented their "demand waterfall" to measure their marketing qualified leads versus disqualified leads, ultimately further aligning their sales and marketing efforts.



DYNAMICS 365 FOR SALES' FEATURES, FUNCTIONALITIES AND SEAMLESS INTEGRATION WITH A VARIETY OF MICROSOFT APPLICATIONS, ENABLED CCL TO BETTER ALIGN THEIR SALES AND MARKETING TEAMS.



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“What was really nice about the implementation of Dynamics and our work with PowerObjects was that they really heard and understood the struggle we had in our previous system. They worked with us to figure out how to achieve our goals for the system”

JENNIFER BRADLEY
Manager of Global Marketing Operations
CCL

SOLUTIONS |CONTINUED|

To support this, CCL and PowerObjects built a custom entity, dubbed internally as “Interest Code,” to granularly view what specific event a lead originated from. Measuring the success of their campaigns and aiding in promotional outreach was a massive benefit to the marketing team.

In addition to developing Interest Code, CCL enhanced the out-of-the-box functionality of Dynamics 365 for Sales by implementing a custom entity for Products and Revenue. This opportunity entity enables users to see projections for a specific product by fiscal year as well as their standard quarterly system. By selecting a product and designating which fiscal year they think the product will sell, they are able to calculate the actual revenue and assign it to a quarter. This allows them to forecast business at a granular level.

Prospecting with LinkedIn Sales Navigator and Inside View

The LinkedIn Sales Navigator and Dynamics 365 for Sales integration gives sellers the ability to tap into their networks to find new leads and prospects by displaying potential connections between current contacts or leads and individuals in companies they’d like to pursue. The CCL team already utilized LinkedIn Sales Navigator before their implementation, so the ability to view the information within Dynamics was an added benefit.

Additionally, CCL leverages data from Inside View to find connections and view research on companies, including their annual reports, to gain knowledge on potential prospects.

Leveraging the Stack of Microsoft Applications

By implementing Dynamics 365 for Sales, CCL was able to integrate the platform with the Microsoft tools their organization was already using, such as Outlook and OneNote. This improved productivity for their employees by eliminating the need to navigate between multiple systems and provided a seamless transition with familiar platforms.

“Our team is already using Microsoft products so moving to Dynamics was a natural decision,” says Perrigo. “As we transition to full implementation of Office 365 this will continue to be an important way to sync all the functionality.”



CHALLENGE

CCL needed a unified platform that could scale with their organization and allow their sales and marketing teams to work more efficiently.

SOLUTION

With the help of Dynamics 365 for Sales, PowerObjects’ very own PowerPack Add-Ons and the Stack of Microsoft Applications, CCL was not only able to build a better process of tracking leads, but gained additional insight behind the data, helping them produce more qualified leads.

BENEFITS

- + Improved Functionality
- + Unified Platform for Sales and Marketing
- + Dedicated support engineer
- + Increase in qualified leads



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BENEFITS

Improving Functionality with PowerPack Add-ons

PowerObjects offers a library of managed solutions for Microsoft Dynamics 365 called PowerPacks Add-ons. CCL utilizes PowerPacks to enhance the functionality of Dynamics 365.

PowerAutoNumber automatically assigns a unique value to a lead once it becomes an opportunity. CCL uses the opportunity number to track a lead from the point of sale to the finance department and reference the number on any opportunity across all their systems.

PowerLastActivity supports CCL's service level agreements, which their sales team are required to respond to within a certain timeframe. The solution displays the last completed activity on a record along with the time and date stamp of that activity, ultimately providing sales managers insight into the last time a record was touched by a sales representative.

CCL also leverages PowerGrid to enable the team to bulk update account data in an editable grid without having to open individual records within Dynamics 365. "PowerGrid alone has been a huge time saver for people," says Perrigo.

A Dedicated PowerSuccess Engineer

CCL is a member of PowerObjects' PowerSuccess program, a completely unique service-as-a-subscription program for personalized support. PowerSuccess provides CCL access to a dedicated CRM administrator to support and sustain a long-term plan for success. From the beginning, CCL's dedicated PowerSuccess engineer worked with the team to understand their unique business needs and developed a custom roadmap to empower them to get the most out of Dynamics 365.

NEXT STEPS

CCL is continuing to enhance functionality by integrating their marketing automation platform within Dynamics 365 for Sales. In addition, their sales team is looking to increase productivity by incorporating a third-party add-on to improve their contact process and store collateral that their sales team can easily distribute.



"I can't imagine embarking on this integration without PowerObjects as our partner. Because they understand us, they understand Dynamics, and they have experience with all our other systems as well, I am really excited about the prospect of what that's going to bring to our organization."

—
JENNIFER BRADLEY
Manager of Global
Marketing Operations
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