



JDL Strategies

Dynamics 365 Sales

About JDL Strategies

JDL Strategies helps everyday Australians build long-term wealth through low-risk investments and customised strategies that work through memberships, webinars, live events, blogs, educational platforms, one-on-one coaching and consultations, our quest to raise the financial intelligence of everyday Australians is at the heart and soul of everything we do.

Their team brings expertise across finance, investing, strategy, risk analysis, accounting and more to ensure each client is a client for life.

Gold
Microsoft
Partner



Client Challenge

The business collects leads from a number of sources including website landing pages. The leads are then migrated to the CRM through an API. As leads become opportunities the business wants to track details of sale for the entire sales cycle.

Salesforce CRM was being used to store information about clients and processes. Unfortunately, the solution was proving expensive and was not providing the business with the required reporting.

"For this reason we turned to Microsoft Dynamics 365 Sales and Apache," said Jon Thomas, CEO at JDL Strategies. "Apache came recommended to us through Telstra and ticked all the boxes regarding the experience required to deliver the required outcomes."

The project critical success factors were:

- The allocation of opportunities to users/teams.
- Measurement of successful opportunities, their outcomes and value.
- Measurement of lost or abandoned opportunities and their value.
- Monitoring of Staff KPI's, including hours interacting with the clients, travel time per client, meetings, tasks, opportunities and business closed.
- To streamline the sales administration workload by standardizing form input.
- The ability to apply security based on staff roles and teams.

Custom reports and dashboards were configured to provide required operational and financial information accurately and in real-time.

The Dynamics 365 Sales mobile application ensures information is accessible, accurate and available for activity updates anywhere and anytime.

The solution was successfully rolled out Australia wide over a period of 6 months and now provides client and sales process visibility at all levels to management and sales professionals.