



## Altius Group reoriented Dynamics 365 Sales platform to suit their industry needs and better decision making

### **About New York Geomatics:**

Founded in 2001, Altius Group is a healthcare service consulting company based in Sydney, Australia. Their core duty involves them to engage with clients to provide tailored, holistic solutions across workplace health and safety, wellbeing, employment, risk and claim support services to enable organizations and their people to optimize their physical and mental health.

You can explore more about them here <https://altius-group.com.au/>

### **Business Requirement:**

The most challenging part of any company's sales team in managing their sales pipeline. Similarly, Altius Group too, being a healthcare company needed a robust tool or app to manage their prospects and leads in a better way. As a professional healthcare firm continued to grow more, the number of prospects had increased and hence, the firm observed that it is important to have a mechanism in place to understand opportunities pipeline.

### **Solution Delivered:**

CloudFronts team reviewed Altius Group's existing Dynamics 365 Sales platform and identified core bottlenecks to realign the app as per their needs and requirements.

Microsoft Dynamics 365 Sales is an app that enables salespeople to build long relationships with their prospects, customers, take actions based on insights, and close sales faster. Thousands of professional services firms are using Dynamics 365 Sales to keep track of accounts and contacts, nurture their sales from lead to order, and create sales/marketing collateral. Moreover, it also allows you to create marketing lists and campaigns, and even follow up on service cases associated with specific accounts or opportunities.

**Key Technologies:**

1. Dynamics 365 Sales

**Post Go Live:**

Post-Go-live, Altius Group is able to experience the following benefits:

1. The simplified user interface enhances lead qualification and helps drive the successful conversion of leads to customer accounts.
2. Dynamics 365 Sales is also tightly integrated with Office 365, which make it easier to
3. access SharePoint to store and view document, presentation, notes, open sales data
4. in Excel and save changes back to Dynamics 365 Sales, all without toggling between
5. the multiple applications.
6. The sales team is now able to access all the customer or opportunity related activities
7. in one center place. This is helping team to overall monitor their results and
8. accordingly, better their decision making.

Additionally, the client team is regularly viewing their sales pipeline and ensuring things are finely tuned and highly optimized to ensure maximum efficiency and success.

**Connect with us!**

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