



CASE STUDY

Proximo 3 implements Dynamics 365 Sales for international financial services company, bringing together teams from the UK, US & Canada, enabling greatly improved efficiencies in international collaboration



Objectives

Club Vita was using a different system to track customers and their sales pipeline in each country they operate in.

With its growing business and recent consolidation of international operations, Club Vita sought to launch a single CRM system for use in all countries.

Challenges

Club Vita had some very specific requirements for recording sales information which they needed Proximo 3 to address.

The existing systems in each country had different legacy sales information quality and layouts. Proximo 3 and Club Vita worked together to combine everything into a single system in Dynamics 365.

Solutions

Proximo 3 worked closely with Club Vita to analyse requirements, design the combined CRM system & educate the team on operating the new system.

As a result, Club Vita now has an effective CRM system used across multiple countries and improved visibility of their customers and sales information.

KEY BENEFITS

- 1 Visibility of customer interactions and sales pipeline across the three teams in the UK, US and Canada
- 2 Reduction in the number of systems used for managing customer information from three systems to one, simplifying training, maintenance & operational processes
- 3 Standardisation of customer & sales management across the organisation, bringing a consistent customer experience and operational efficiencies



I highly recommend Proximo 3 as they've fulfilled our needs and surpassed our expectations. We are now fully operational and able to operate our CRM across our organisation in 3 different countries.

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