Enterprise to launch new instance of our CRM

Coming together under our organization has allowed us to enhance our processes, tools, and efficiencies for responding to customer needs and serving as a strategic partner in our industry.

As we take the next step forward, appropriate transparency and collaboration across our business is required and our CRM is key to achieving our goals. To serve our clients more effectively, **we're excited to launch our new, expanded CRM instance on Monday, October 3.**

This new instance will provide you a more efficient user experience, integrate with businesses across our enterprise to continue driving solutions for our clients, and automate our processes to streamline efficiencies and data insights.

Update benefits

- **Earlier chain linking:** With our enterprise partners joining us on the new platform, we'll achieve greater visibility and collaboration, and focus business development earlier in the process.
- **Enhanced user experience:** Dashboards and graphical views provide key information upfront to minimize time spent hunting for it.
- **A common framework:** The new CRM instance will bring legacy business units into one framework for creating and managing new growth opportunities.

Training

We will kick-off training the week of **September 19,** including virtual, instructor-led training sessions, and step-by-step instructional takeaway materials. We will also provide increased office hours where team members are encouraged to join, ask questions, and receive immediate feedback. All training will be recorded and archived for reference and new hire onboarding.

Additional support

In addition to our trainings, several team members already utilizing the new CRM instance have been participating in the project to ensure utility and a seamless transition. Please lean on these colleagues, ask them questions, and have honest, open discussions with your managers about what's exciting or challenging you about this update.

Leadership actions for business continuity

To ensure a seamless transition to the new CRM instance, leaders need to 1) identify who within their service lines require licensure, 2) prioritize training attendance, and 3) support the regular use of the platform. The system is only as good as the inputs and an accurate view of our sales process are critical as we demonstrate our value in the marketplace.

Questions?

For questions about the project, please reach out to our Business Solutions partners.