

# THE LEVEL GROUP CASE STUDY

Utilising Microsoft Dynamics 365 Sales platform to generate strong business growth

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## OBJECTIVES

The Level Group provides bespoke financing solutions to their partner solicitor firms – assisting with refinancing CFAs, cash flow management alongside other one-off situations. A key part of the business is maintaining a contact list of solicitors.

Having looked at numerous solutions they knew they needed a CRM which could handle the deep connections between their Business Development outreach and managing finance agreements.

## SOLUTION

Having originally looked at Salesforce. The Level Group contacted Microsoft who presented two partners, one of which was Cloud2020. The Level Group felt the certainty of the fixed price offer fitted their requirements well.

The Level Group opted for Microsoft Dynamics 365 Sales, with customised dashboards around Business Development team's activities such as appointments, outreach telephone calls and emails.

## BENEFITS

Managing the information reporting about BDM activity was challenging. With the clarity of information provided by Microsoft Dynamics Sales, The Level Group Management team now understand where the opportunities are generated and which activities lead to them being converted to sales.

This has resulted in The Level Group showing a tangible improvement linked to having a CRM which has supported and reported on business growth.

Within multiple areas of the company, the flow of communication has improved exponentially. Having one central source of truth means all team members can connect to the same information set and are able to make decisions that align with the aims of the business.



## AT A GLANCE CHALLENGES

Investment in a business platform the suited them  
Improved Information reporting  
Business growth

## BENEFITS

- Clarity of information
- Increased support of and reporting from Business Development team
- A scalable platform



## ADAM GREENBAUM

FINANCE DIRECTOR

"CRM is working Brilliantly. Microsoft Dynamics Sales is working, and being used well across teams. Being a part of the Microsoft suite/stack allows all information to add to various platforms, including Teams and Office 360 products"