

CRMD-HSO WIN WIRE: CMLS Financial

Customer Details	CMLS Financial is one of Canada's largest independently-owned mortgage services companies. With offices across the country, CMLS Financial provides a wide range of commercial lending services, residential real estate mortgages, and institutional services.
Project Type	Dynamics 365 Sales Implementation
Deal Size	Not Applicable
Industry	Financial Services
Problem Solved	Following a failed implementation, CRMD-HSO was selected to resolve business process and system issues. CRMD-HSO proposed implementing Dynamics 365 Sales in four phases. Phase 1 – Digitize & Familiarize: A digitized master client list will be made available in a view-only format for the origination team to familiarize themselves on the initial formatting. Phase 2 – Integration & Configuration: Dynamics will be configured to allow for editing & uploading and both mobile/outlook will be made available to the origination teams. Phase 3 – Leads & Reporting: Lead configuration & dashboarding will be included for the teams as well as modifications based on previous commentary. Phase 4 – Nice-to-haves: This release will be ongoing and will address feedback as well as the integration of supplementary pieces proposed by the origination, MAG, and other teams. .

CRMD-HSO Team	Eric Garnham - Senior Account Executive Dirk Schrader - Managing Director at CRMD an HSO Company
Microsoft Team	Jeff Hendry - Enterprise Channel Manager



CRMD-HSO TEAM



Eric Garnham



Dirk Schrader

MICROSOFT TEAM



Jeff Hendry

