



CASE STUDY

# Grupo Fleury digitally transforms its commercial business

## Business situation

### Motivators to boost the business area with Microsoft technology

The highest volume gateway to new business for Grupo Fleury, one of Brazil's largest and most respected medical organizations, is found in [Microsoft Dynamics 365](#) – the solution that optimized internal communication, simplified management processes and improved team visibility. With the support of Avanade, a Microsoft partner company, it has also developed low code tools for visits and services of its B2B segment.

In recent years, Grupo Fleury has undergone an accelerated process of expansion and the acquisition of new brands to support an integrated, preventive and hybrid health ecosystem, covering physical and digital offerings. Its commercial segment, which represents the largest volume of its new business, needed to institutionalize its data to improve operations and communications with other areas of the company.

The organization wanted to implement a system with a single data repository to assist employees with new business prospecting, boost collaboration among professionals, increase new customer conversions, enhance and optimize portfolios of its structured accounts, as well as the sale of services to laboratories and hospitals.

## Solution

### Dynamics 365 empowers Grupo Fleury

Grupo Fleury and Avanade chose Dynamics 365 Sales that offers digital sales capabilities coupled with integrated intelligence, providing sellers with adaptive guidance to better serve their customers. This decision was aided by the recent digital transformation experience Grupo Fleury's service team acquired. "It was a point of convergence regarding interaction improvement and standardization, and the synergy of the system and information," explains Valdemar.

The tool supports information management, using a data repository which allows for real-time monitoring by the commercial team and the visibility of work by the business team. The transformation included the implementation of low code solutions.

To support the return of face-to-face visits, an app was created for client check-ins, the documentation of meeting minutes and a place to store related meeting information. This was developed using [Microsoft Power Apps](#) – a set of Microsoft smart solutions that dispenses with sophisticated code knowledge. "This came from the need to understand field visit interactions," Valdemar says.

"The first need was a repository to improve patient registration and basic interaction information. The second was to improve communication between the team and the business area. The third was a management focus to monitor business and team performance, and to parameterize demand volume, estimate headcount, potential revenue and calculation of commercial goals."

#### Valdemar Junior

Coordinator of Management, CRM and Commercial Support, Grupo Fleury

In addition, a B2B relationship web portal was created using Power Apps. "We started with some online service request capabilities for some large customers," he adds.

The implementation project consisted of four modules and was delivered in 12 months. The entire process was supported by Avanade and generated a cultural transformation among the team, promoting use of the platform through campaigns, incentives and a gamification process for updating contacts in the system.

## Results

### Operations empowered with technology

The commercial team has a new way of reporting their tasks. "People now record all individual performance, which has improved the oversight of sales activity. Now I can measure everything that has become new business, which provides excellent insights," Valdemar says.

Other areas of the organization now have more visibility to the commercial team. "Everyone is responsible for their report in CRM. We do a weekly extraction, and we can segment that information and opportunities without the management having to bureaucratize the process", he says.

The team is finding several benefits of the new platform such as preventing duplication of work and enhancing collaboration. "Executives see the advantage and recognize the added visibility this lends – something they didn't have before." This process monitoring start to finish, thinking about the user, is much better," he adds.

## Satisfaction with the process of digital transformation

Valdemar celebrates the partnership with Avanade and explains that the commercial team now plans to fine-tune the solution to support additional needs.

## About Grupo Fleury

Grupo Fleury is a medical company whose core business lies in medical examinations. It specializes in both the laboratory analysis of bodily fluids and diagnostic imaging examinations, such as ultrasound and resonance, among others. With a portfolio of approximately 3,500 exams, Grupo Fleury operates 243 units in nine states across Brazil and brings together brands such as Fleury Medicina e Saúde, +Medicina Diagnóstica, Laboratório Weinmann and others.

"The Avanade design team helped guide our development and provided CRM usage expertise. They optimized their time with us and having their expert feedback was very important. The feedback from our deployment team was very positive. Speaking of design, the methodology was the best choice we could have made."

### Valdemar Junior

Coordinator of Management, CRM and Commercial Support, Grupo Fleury

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**About Avanade**

Avanade is the leading provider of innovative digital, cloud and advisory services, industry solutions and design-led experiences across the Microsoft ecosystem. Every day, our 56,000 professionals in 26 countries make a genuine human impact for our clients, their employees and their customers. Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at [www.avanade.com](http://www.avanade.com)

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