

Case Study

Vernacare Limited

Canvas Power App
for Sales Meetings



Company Introduction

Vernacare and its international network of partners, provides market-leading hygiene & surgical solutions that prevent infection and create a safer future. Vernacare is the world's biggest producer of single-use toileting products, with over 170 million units emerging from their production sites every year, with a major presence in the UK, Canada, Australia, Singapore, India, South Africa, Spain, Italy, France, the Netherlands, Norway, and UAE.

Vernacare hoped to improve the way in which their sales team logged their Sales Visits, logged their meeting notes, recorded meeting actions and tracked the progress of these actions. A key requirement for Vernacare was that any proposed solution should have offline capabilities due to the nature of the work, as the sales team are often on the road in areas with limited connectivity, as well as at sites with no connectivity.

Website: <https://www.vernacare.com/>



200⁺ staff
Company size



53 users
Solution size

Solution Components

- Microsoft Dynamics 365 Sales
- Microsoft Power Apps (Canvas App)
- Microsoft Power Automate Cloud Flows

Project Summary

Whilst Strategy 365 has worked with Vernacare for some time, this case study focuses on a recent project to implement a new solution to meet the needs of a specific team and satisfy challenges that were identified.

Due to the frequency of which members of the Vernacare sales team work without connectivity, any solution was required to have offline functionality. Prior to this project, the sales team were completing Word document templates, entering relevant information and topics of discussion, as well as adding actions from the meeting and any supporting images. Issues arising out of this legacy process included a lack of continuity between writing meeting notes and tracking the actions arising from them, meaning follow-up activities were missed and data was not tracked back into the central CRM system.

Following discussions with Vernacare, Strategy 365 proposed a solution to enable all required meeting notes, data, actions and supporting images to be entered directly into a Power Apps canvas app regardless of where in the world they were. A new canvas app was created with all required components, including images and an area to add as many required meeting actions as needed.

Once a follow-up action is created and assigned to another user they are automatically notified, reducing the need for manual communication of actions. Users can easily view and monitor all actions that they have outstanding ensuring a clear, centralised list of actions to complete. Once an action is approaching the specified due date, the assigned user receives an alert, notifying them that they have an action due. They can then complete the action and mark it as complete.

Key Deliverables

- Mobile-first app, optimised for tablet use
- Offline functionality
- Ability to create any number of meeting actions from meetings
- Ability to capture and store supporting photographs from meetings
- Ability to create and manage meetings and meeting actions from Dynamics 365 Sales
- Automation based on meeting actions
- Scheduled generation of meeting reports

Benefits

Members of the sales team can now create their scheduled meetings, either directly from the canvas app or from Dynamics 365 Sales, and then complete their meeting notes, regardless of whether they are online or offline.

This solution also allows users to enter meeting actions and assign these actions to others. Users can now easily monitor and track their outstanding meeting actions and assignees will receive alerts to notify them when a meeting action is approaching its due date, reducing the likelihood of due dates not being met.

This solution reduces administration as users are only completing meeting notes once, in one central location, and enables simplified management of tasks and activities generated from a sales meeting.

"With all the international travelling we do, we needed something simple, which enabled us to plan, record and review meetings, both on or offline. We had tried unsuccessfully for years with a variety of solutions but now we can truly say that we have a way to achieve everything we set out to. Working with Strategy 365 has been seamless as they ensured they fully understood what we wanted before they started any work. They then held our hand every step of the way and gave full training once the app was completed. Couldn't recommend them highly enough."

Hakeem Adebiyi, International Sales and Marketing Director, Vernacare Limited