

OBHG PHASE 1 READOUT · CRM DEEP DIVE

A \$675M company running on under-leveraged systems

Tung analyzed OBHG's live Dynamics 365 under read-only access. The system is rich but badly under-leveraged – the symptom of scaling to \$675M without a strategic operating partner. OBHG is now migrating off Dynamics to Salesforce or HubSpot.

Without a partner who owns governance, attribution, and adoption, the same mistakes get rebuilt in the new platform.



THE THREE FINDINGS

- 1 \$1.5M–\$1.7M wasted on unused CRM licenses.**

~1,500 of 1,845 seats sit on clinicians who never log in.
- 2 Losing to the in-house status quo, not to competitors.**

91% of losses keep coverage in-house; under 1% go to a rival.
- 3 Attribution is broken; spend cannot be traced to revenue.**

Zero source on 140K contacts; 71% of candidates have none.

THE CASE FOR PARKERWHITE

These problems were built **without a strategic partner** – and a migration without one simply rebuilds them in the new CRM. We propose to be the migration and commercial growth partner, the discipline that prevents the next \$1.5M mistake, regardless of which platform wins.

What is actually inside their Dynamics

A heavily built, well-instrumented platform — the question is governance, not capability.

PLATFORM & DATA

Single-tenant Dynamics 365, data back to 2013, **172 custom tables**. Core records: 140,000 contacts, 33,918 candidates, 12,512 clinicians, 10,850 employment records, 7,471 hospital accounts, and 6,241 opportunities. Activity runs at **318,000 notes, 194,000 emails, 70,000 calls**, and 219,000 audited operations a month. Active development continues (Sprint 013, June 2026).

AUTOMATION & INTEGRATION

195 classic workflows, 170 business rules, 495 custom actions, 40 Power Automate flows, and **5,000+ plugin steps**. Integrations include ClickDimensions (marketing), Adobe Acrobat Sign, Maplytics and Esri (mapping), Origami SFTP, Omnichannel, and Forms Pro. A data-lake export to Azure Synapse and Fabric already exists. **No AI is active** — no Copilot, no AI Builder, no bots.

SECURITY & COMPLIANCE

Org-level auditing is on with **730-day retention**, strong for healthcare. 31 field-security profiles lock down clinical and PII data. 271 security roles — over-provisioned and a candidate for rationalization. Login auditing is off, which limits per-user activity reporting.

THE READ

This is a heavily built, well-instrumented platform that has **outgrown its governance**. The engineering is disciplined; the commercial and marketing use of it is not. **That gap — not the technology — is the problem.**

FINDING 1 · LICENSE WASTE

\$1.5M–\$1.7M wasted in plain sight

OBHG pays full CRM seats for ~1,500 clinicians who never log in. The actual user base is ~260–320 people. Reclassifying clinician records to non-licensed ownership **keeps all data and removes the cost**. At ~\$95 per user per month list price, that is an estimated **\$1.5M–\$1.7M a year** — to validate with their Microsoft rep.

LICENSE FOOTPRINT VS. REAL USAGE

LICENSE CATEGORY	COUNT
Full read-write licenses (enabled)	1,845
Clinical role holders who never transact	1,364
Back-office operators (the real users)	462
Users active in last 90 days	323
Users active in last 30 days	261

THE FIX · LICENSE RATIONALIZATION

Move the ~1,500 placeholder records to **Team Member, service-account, or Contact ownership**. Same data, same history, no records touched. **Zero data loss.**

FINDING 2 · WIN / LOSS

Losing to the status quo, not to competitors

OBHG wins only **7%** of opportunities, but **91%** of losses are hospitals keeping coverage in-house. Only 39 of 5,649 losses went to a competitor (Pediatrix 19, TeamHealth 18, Envision 1). The lever is **conversion velocity against the status quo** on a ~500-day cycle — not competitive displacement.

PIPELINE AT A GLANCE

WIN RATE	CONCENTRATION	DATA GAP
7% — 415 won, 5,649 lost, 176 open; cycles run 498 & 398 days.	3 reps own 80% of open pipeline; 162 of 176 touched in 90 days.	Loss-reason fields 92–99% empty — an easy mandatory-field win.

ACCOUNTS ARE A PROSPECT MAP, NOT A CUSTOMER BOOK

ACCOUNT STAGE	COUNT	% OF ACTIVE
Lead (prospect)	5,277	77%
No stage set	899	13%
Active account (live program)	349	5%
Onboarding	27	<1%
Active OBstat	11	<1%

FINDING 3 · ATTRIBUTION

Attribution is broken, spend is untraceable

No marketing source is captured on **140,000 contacts**, and over 70% of candidates have no recorded source. Spend cannot be tied to pipeline or hires, so marketing and recruiting ROI is **unmeasurable**.

RECRUITING FUNNEL – THE LEAK IS AT FIRST SCREENING

STAGE AT WITHDRAWAL	COUNT	% OF WD
Clinician interview & background (Stage 1)	3,339	27%
Credentialing	1,657	14%
Contracting	1,293	11%
Hospital meet & greet	1,195	10%
Later stages	462	4%
No stage recorded	4,304	35%

WHERE TO ACT

The biggest leak is **first screening** (speed and seriousness). The higher-value leak is mid-funnel at **credentialing and contracting (~2,950)**. 10,791 written withdrawal reasons can be theme-coded without new research.

Dormant tooling, no AI, and the gaps

MARKETING AUTOMATION – CLICKDIMENSIONS

Installed but dormant, effectively paid shelfware: zero UTM populated, an aging plugin (MsCrm2011), and access-restricted tables. The 47,000+ monthly emails run on server-side sync, not campaigns. **Decision:** revive deliberately (upgrade + configuration) or replace with a modern stack (HubSpot, Marketo, or native D365 Marketing).

AI READINESS – NOTHING DEPLOYED, CLEAN RUNWAY

No Copilot, no AI Builder, no bots. A partial provisioning signal (M365 Copilot Sales profile) and an Autonomous Coding solution exist. **Immediate opportunities:** Copilot record summaries, AI Builder on credentialing packets, and prediction models for candidate-to-hire and win likelihood.

DATA-CAPTURE QUICK WINS (CONFIG, NO BUILD)

- **Loss reason required on close** – 92–99% empty today.
- **Candidate source required at creation** – 71% empty today.
- **Stamp funnel stage on every withdrawal** – 35% missing today.

ACCESS PARKERWHITE STILL NEEDS

- **Lead table** – privilege-denied; needed to see how leads flow in.
- **ClickDimensions tables** – all cdi_ entities blocked; needed for the marketing audit.
- **Elevated reporting role** – current access is insufficient for a full attribution audit.

TECHNICAL DEBT

Workflow and plugin overlap (495 actions, 195 workflows, 40 flows), 5,000+ SDK steps, 271 security roles, 252 blank employment records, and inconsistent email casing – all consolidation and clean-up candidates.

The roadmap, and the case for PW

IMMEDIATE

Phase 1 support

- Request elevated access to Lead and ClickDimensions tables.
- Make loss reason and candidate source mandatory.
- Document the license cost case with exact figures for the executive readout.

SHORT-TERM

90–120 day activation

- ClickDimensions commit-or-kill decision.
- Define the attribution architecture (UTM taxonomy, field rules) before any paid media.
- Run the license rationalization project (\$1.5M–\$1.7M savings).

MEDIUM-TERM

Phase 2 & beyond

- Enable Copilot across the active user base; pilot AI Builder on credentialing.
- Consolidate workflows and reduce the plugin surface.
- Build an account-scoring model on the 5,277 mapped prospects.

Method: all data via read-only Dataverse queries. No records opened, changed, or exported, and no patient data accessed. Lead and ClickDimensions tables were access-restricted.

THE THESIS

OBHG is migrating off Dynamics. Whether they choose Salesforce or HubSpot is the smaller question. **License waste, broken attribution, and weak governance were built without a strategic partner – and a migration without one rebuilds them.** ParkerWhite proposes to be the migration and commercial growth partner. This is the urgent part of our full Phase 1 readout.