

Enabling a Tech Service Provider To Automate Sales Processes With MS Dynamics

HIGHLIGHTS



Better lead management
and lead tracking



Improved sales pipeline
and sales process



Improved data visualization
for better insights



Organized CRM based on security
roles and team hierarchy within
the organization

THE CUSTOMER

The customer is a leading global innovative digital solution provider that caters to mid and large-scale organizations. They also specialize in digital marketing, analytics, web development and design, and online communities. They have been enabling business transformation with digital solutions leveraging cloud, mobile, and, social media.

THE CONTEXT

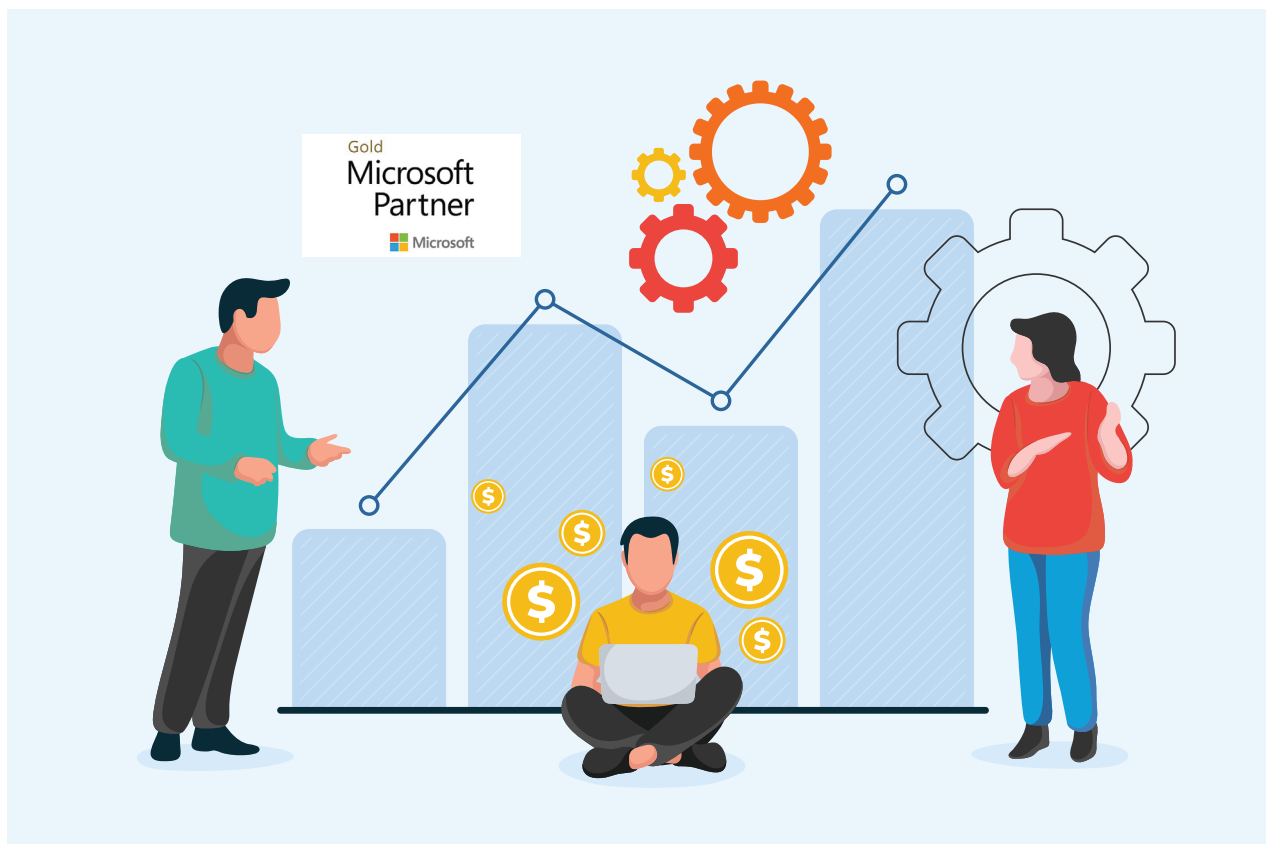
The customer was storing and maintaining its lead data in MS Excel or file systems, which made lead management complex. Moreover, there was no proper lead pipeline, making tracking impossible. Maintaining the data in sheets also made it challenging to keep a track of the lead status/activity, resulting in lost sales. The customer required a centralized repository for all the CRM data and to have a centrally managed process.

THE OBJECTIVE

The objective was to enable the customer to get complete visibility into sales and marketing leads in an organized manner. They wanted to implement a lead management system that helps them store, track, use, and manage their lead data efficiently and effectively to bring in more revenue. They also wanted to implement advanced tracking capabilities to keep a close eye on high-quality leads.

THE SOLUTION

- We implemented the MS Dynamics CRM module with built-in leads and a sales process.
- Our team built workflows to power and automate the sales process such as lead assignments, lead activities, and reminders.
- We created detailed reports for managers to provide better visibility into the sales pipeline using Microsoft Power BI.
- We also customized lead lifecycle stages as per the client's use case and process. We integrated MS Dynamics with Marketo for lead flow with two-way syncing.



THE OUTCOME

By implementing a lead management system, the customer is now able to effectively store, manage, and track their lead data, resulting in improved conversions and sales. They are also able to monitor their high-quality leads with advanced tracking and improved sales process and pipeline.