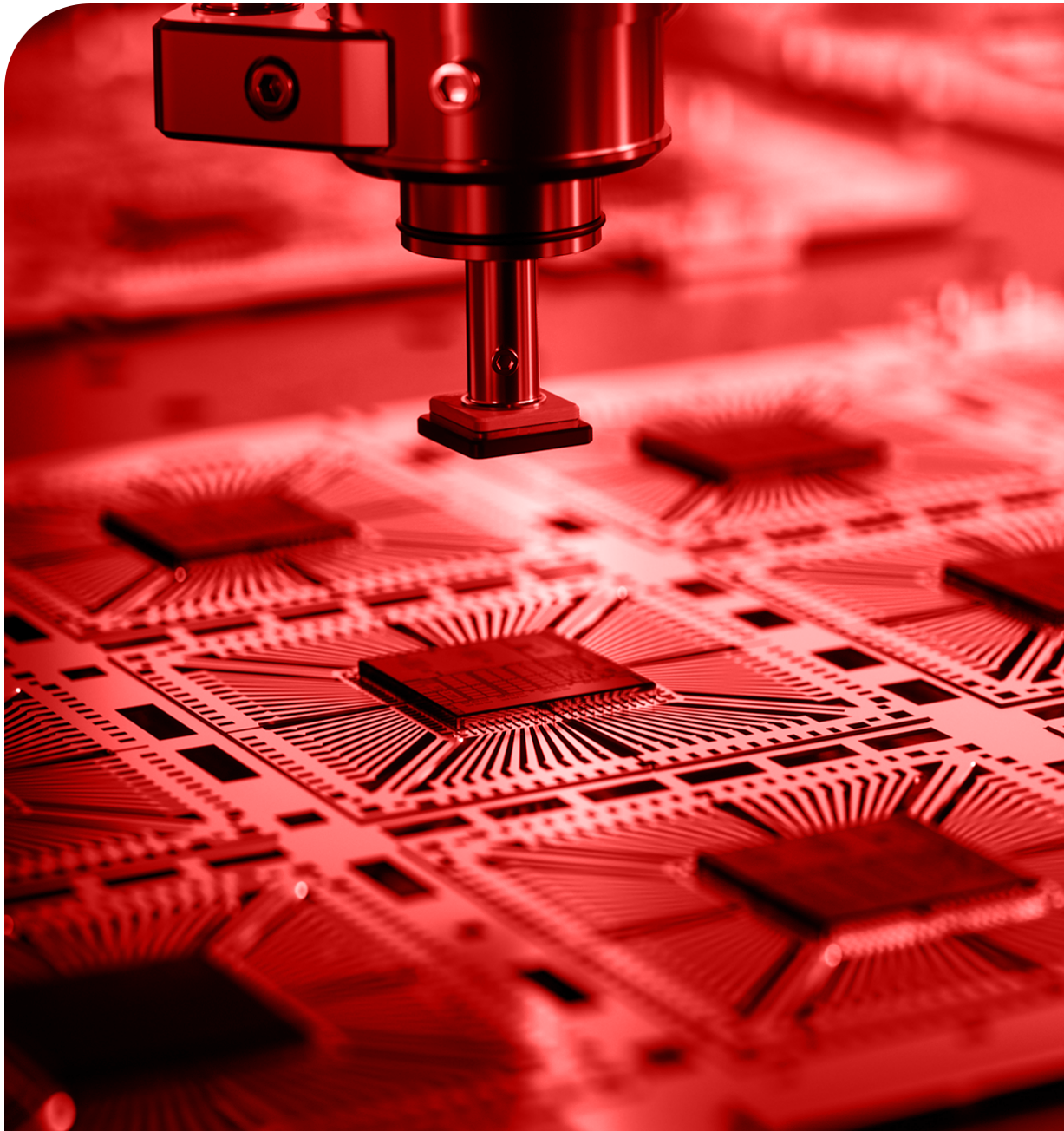
Synoptek

Case Study

SharePoint Online and Power Apps Simplify Lead Tracking and Sales Operations for Window Manufacturer



Customer Overview



Customer

Champions Windows

Profile

The client is a leading manufacturer and marketer of windows, doors, sunrooms, roofing, and siding products.

Industry

Manufacturing

Services

SharePoint Online, Microsoft PowerApps

Business Need

Champion Windows lacked a centralized system to manage leads, appointments, and sales activities across its nationwide locations. Reliance on Excel spreadsheets and email limited real-time visibility, complicated appointment assignments, and created communication gaps between managers and sales representatives. These challenges led to missed follow-ups, lost sales opportunities, reduced productivity, and higher administrative costs.

To overcome these inefficiencies, Champion Windows needed an automated solution to streamline lead management, simplify appointment scheduling, and improve team collaboration. The solution also needed to provide real-time updates, timely notifications, and mobile access to sales information, including offline capabilities.

- Replace manual Excel and email processes with centralized lead and appointment management.
- Automate lead assignments based on location and sales rep availability.
- Improve real-time visibility into lead status, appointments, and sales activities.
- Simplify appointment scheduling, daily planning, and customer follow-ups.
- Deliver timely notifications for assigned, rescheduled, and postponed appointments.
- Reduce missed follow-ups and minimize lost sales opportunities.
- Enable mobile access to sales data, including offline capabilities.
- Reduce administrative effort, communication gaps, and operational costs.



Solution and Approach

To streamline and automate their manual process, manage sales appointments and improve business outcomes, Champion approached Synoptek to deliver a solution. Their primary objective was to enhance workforce collaboration, facilitate easy access to information, and streamline leads/appointments.

Synoptek partnered with Champion Windows to automate sales operations, streamline lead and appointment management, and improve collaboration between managers and sales representatives.

Using Microsoft Power Apps and SharePoint Online, Synoptek developed custom applications, automated workflows, and Azure WebJobs to simplify lead distribution, appointment tracking, and sales reporting.

- Developed Azure WebJobs to retrieve leads from the line-of-business database and sync them with SharePoint lists.
- Built a lead management application for managers to view, track, and assign location-specific leads and appointments to sales representatives.
- Created a Power Apps application for sales reps to manage appointments, plan travel, record customer feedback, update lead details, and change appointment statuses.
- Automated daily email notifications for assigned, pending, and postponed appointments, along with cancellation alerts for managers.
- Enabled managers to export lead and appointment data to Excel for reporting and analysis.



Business Benefits

The implementation of Microsoft Power Apps and SharePoint Online helped Champion Windows automate sales operations, reduce administrative effort, and improve coordination between managers and sales representatives. The solution streamlined appointment management, enabled real-time visibility, and enhanced productivity across locations.

Improved Manager Productivity

Real-time sales rep updates, location tracking, and advanced filtering simplified assignment planning and activity monitoring.

Reduced Maintenance Costs

Lowered administrative overhead associated with patching, hardware maintenance, and security management.

Maintained Appointment History

Recorded appointment details to support customer insights and future follow-ups.

Enabled Mobile Accessibility

Allowed sales reps to manage appointments anytime, anywhere, using iOS and Android devices.

Ensured Reliable Data Migration

Migrated 2 TB of data while preserving version history, metadata, and permissions.

Automated Notifications

Kept managers and sales reps updated on assigned, pending, postponed, and cancelled appointments.

Minimized Manual Effort

Automated routine sales processes, minimized administrative tasks, and improved operational efficiency.

About Synoptek

Synoptek is the first IT Managed Experience Provider (MxP™), delivering AI-enabled automation, strategic modernization, and experience-led outcomes. Its services span Cloud and Agile Infrastructure, Business Applications and Platform Development, Customer and Employee Experience, and Cybersecurity. With a business-first approach and a global delivery model, Synoptek helps organizations optimize operations, accelerate transformation, and achieve measurable results—guided by a culture rooted in growth, ownership, inclusiveness, and philanthropy.

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