

Dynamics CRM Online Implementation Helps Automate Sales Processes and Improve Efficiency

Customer: Alliance for Audited Media (AAM)

Industry: Professional Services

Size: 101-300 employees

Profile: AAM is a recognized leader in providing cross-media verification and information services.

Region: USA

Services: Microsoft Dynamics CRM Online

Business Need

Powering transparency and collaboration between North America's leading media professionals, AAM provides data driven insights, technology certification audits, and information services to more than 4,000 publishers, advertisers, agencies, and technology vendors.

AAM relies heavily on a healthy sales cycle for its growth and revenue generation. Due to an overload of administrative work, their sales team was unable to focus on core sales activities. They were facing challenges in managing leads and sales opportunities, sharing sales data, and developing sales reports. In addition to this, they were dependent on inefficient Excel spreadsheets to organize and manage sales data.

To overcome this, AAM decided to implement a customer relationship management (CRM) solution as an all-encompassing suite of software that could streamline their sales cycle, automate sales processes, and help their sales team increase collaboration and move away from spreadsheets and unreliable data sources.

For this, AAM contacted several technology firms to identify the right implementation partner. Synoptek demonstrated the Dynamics CRM Online solution and showed how its capabilities would work for AAM. Ultimately, Synoptek was sourced as a partner for their CRM implementation.

Solution and Approach

Synoptek (formerly Indusa) implemented the Dynamics CRM Online solution to support AAM's sales process and automate sales activities. In addition to this, it was integrated with the existing Dynamics AX and SharePoint systems of AAM.

Implementation:

The key modules implemented include:

- **Account Management**
Manages records related to existing and new customers who interact with sales.
- **Contact Management**
Manages the information related to individual people; a contact can be related to an account or can be an individual customer.
- **Opportunity Management**
Enables sales to:
 - Capture and track opportunities
 - Segment opportunities for viewing and reporting purposes
 - Make business decisions based on up-to-date information on opportunity pipeline
 - Manage opportunity product (opportunity and multiple products associated with it)
 - Track year over year values of the master budget
 - Effectively measure wins and losses
- **Lead Management**
Enables sales to:
 - Capture and track leads

- Assign leads and related tasks
- Simplify lead qualification, scoring, and conversion
- Segment data to generate leads from AAM's customer base

Integration with Dynamics AX:

Another transformational initiative for AAM has been a one-way integration established between the existing AX system of AAM, and Dynamics CRM Online (AX to CRM). The integration consists of mapping AX entities including account, contact, product, and master budget.

Integration with SharePoint:

Dynamics CRM Online was integrated with AAM's existing SharePoint system, so that the sales team is able to access the 'Account' entity of SharePoint from the CRM's 'Account' entity.

Dashboards and CRM Analytics:

Interactive visual dashboards and custom reports were developed to provide the sales team with real time business insights. Dashboards were developed to provide a snapshot of CRM entities such as activities, leads, and opportunities. SQL Server Reporting Services (SSRS) reports were created to support CRM analytics.

Out of the box CRM activities were utilized to track correspondences with prospects and customers. In addition to this, the Microsoft Outlook client was utilized to integrate Outlook activities with CRM entities.

Based on the specific requirements of AAM, Synoptek configured mobile forms for Dynamics CRM to provide their sales team with mobile access.

Business Results

The advanced but easy-to-use features of Dynamics CRM Online has helped AAM simplify and automate their sales processes, as well as streamline sales activities, improving sales and customer engagement.

The solution helps the sales team gain a complete view over their sales cycle. They are able to effectively focus on the right prospects and customers, and leverage information that leads to better decision making based on insight.

Integration with AX and SharePoint provides the sales team with access to relevant customer data. This has significantly reduced annual IT expenses regarding total cost of ownership in terms of hardware, maintenance, and support. Using both Dynamics solutions also helps streamline processes as they have the necessary information available at all times. With data-driven decision making in real-time, AAM is now free to focus its effort on its core business, and on providing exceptional customer service.

With the native Microsoft Outlook client, built-in Microsoft Office features, contextual data visualizations, and mobile access, the solution minimizes busy work and puts the right information in the hands of a sales person.

Using Dynamics CRM Online, the sales team is able to spend more time selling and less time on administrative tasks by using its intelligent sales capabilities with real-time analysis on sales performance and improvement, which was crucial for the organization.

About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.