

# Dynamics 365 for Sales Helps a Versatile Industrial Contractor Transform Sales and Optimize Customer Engagement

**Customer:** A leading general industrial contractor.

**Size:** 1001-5000 employees

**Region:** Louisiana, , USA

**Industry:** Engineering, Procurement, and Construction (EPC)

**Profile:** The client provides a multitude of construction, turnaround, and maintenance services.

**Services:** Dynamics 365 for Sales

## Business Need

As a seasoned veteran in the industrial construction turnaround and maintenance arena, the contractor provides quality services for each phase of industrial construction and pipe fabrication to a diverse mix of industries in over 30 states in the United States.

Despite having customers nationwide, the contractor lacked a tool to create and maintain a clear view of customers, from first contact through purchase and post-sales. The lack of customer information made it challenging for the contractor to improve customer relationships and deliver the best experience.

Until recently, the contractor did not maintain an accurate record of their sales activities. As a result, it was difficult for them to forecast sales trends and predict revenue, and define the organization's strategic direction.

With sales being a fast-moving game, the contractor realized that they required a customer relationship management (CRM) solution that could provide a comprehensive view of customer data, capabilities to streamline sales processes, while also assisting the executive team in making effective decisions by providing reliable sales and revenue forecasts through a centralized computer record system.

In addition to implementing a CRM solution, the contractor wanted to create a custom entity in the CRM, to view the details related to the forecasted revenue for each of their jobsites.

## Solution and Approach

To address this situation, the contractor engaged with Synoptek to implement Dynamics 365 for Sales, based on Synoptek's strong experience in delivering Dynamics solutions globally.

Synoptek's Dynamics 365 experts worked closely with the contractor's IT staff to develop and execute a plan that stayed on track and within budget, paired with solid lines of communication throughout the project.

The key phases of the project involved implementation of Dynamics 365 for Sales (to support the contractor's sales process, from acquiring a new lead through the close of a sale), creation of customized dashboards, and its integration with Microsoft Outlook.

### Implementation:

The key modules implemented include:

- Account Management - Enables the sales rep to: Track all accounts and related contacts, opportunities, and cases, as well as, generate quotes, sales orders, and invoices for accounts
- Contact Management - The sales rep gets a complete view of customers, including activity history, key contacts, and communication.
- Lead Management - The sales rep can manage leads through the entire sales cycle, from identifying leads to converting them into opportunities.
- Opportunity Management - Enables the sales rep 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 (including the opportunity and multiple products associated with it)
- Track year over year values of the master budget
- Effectively measure wins and losses

#### **Sales Forecast Entity:**

Synoptek created an out-of-the-box customized entity using Dynamics 365 for Sales i.e. Sales Forecast Entity, to help the contractor view the details related to the forecasted revenue. This entity shows the contractor the forecasted revenue for their upcoming eight fiscal quarters, for each of their jobsites – the forecast is a rolling projection that is revised and moved forward each quarter; in each new quarter, the old plan is cloned and moved forward.

#### **Dashboards:**

Leveraging Dynamics 365 for Sales, Synoptek created customized, interactive visual dashboards for the contractor to review their leads, active accounts, open opportunities, and set and track revenue goals.

#### **Outlook Integration:**

For the contractor to use Dynamics 365 for Sales features directly from Microsoft Outlook, Synoptek installed and configured the Outlook integration tool. With this, the users can continue to work from their email platform and simultaneously record customer activities in Dynamics 365 for Sales.

#### **Office Lens Integration:**

Synoptek integrated Office Lens with Dynamics 365 for Sales, to facilitate the contractor scan and import business cards, and thus create a contact in Dynamics 365 for Sales.

#### **Yammer Integration:**

Dynamics 365 for Sales was integrated with Yammer to help the contractor create a separate yammer group and discuss about leads, opportunities or accounts.

Based on the requirement of the contractor, Synoptek also configured Artificial Intelligence (AI) based sales insights, to help the contractor easily track customer-related activities.

### **Business Results**

Implementing Dynamics 365 for Sales as the central organizing point for all customer data has allowed the industrial contractor to have a comprehensive view of customer information and interactions through the tightly-integrated sales, marketing, and customer service features and a totally digitally transformed way of working with clients.

With key sales data at sellers' fingertips and the availability of customized, interactive visual dashboards the contractor has gained in-depth insight into necessary sales and revenue data, allowing them to better strategize and initiate effective courses of action. The executive team can now make faster, more informed, financial decisions and figure out where they are heading as a business.

Seamless integration between Dynamics 365 for Sales and Outlook has ensured that users can manage emails, schedule appointments, capture customer discussions, and much more with a familiar interface.

The automated digital workflow with Dynamics 365 for Sales has proved to be a powerful business solution that has helped the contractor drive consistent and measurable improvement in everyday business processes. It has provided them with quick returns and has become a vital component in developing their business strategies.

## 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.