

Leading Telecommunications Service Provider Automates Core Business Processes

Customer: A leading Texas-based telecommunications services provider

Size: 201-500 employees

Region: USA

Industry: Telecommunications

Profile: A leading provider of telecommunications services, focused on providing highly secure fiber-based data and voice services to enterprise and carrier customers

Services: Microsoft Dynamics CRM 2016 On-premises Support Services

Business Need

Being a provider of highly secure fiber-based data and voice services to enterprise and carrier customers (B2C), the client had to deal with a great deal of financial transactions every day. The provider implemented a finance system (**Omnia Billing System**) to handle day-to-day finances through a third party which turned to be very complicated and time-consuming.

In order to manage the Omnia Billing System, the client decided to implement Microsoft Dynamics CRM on-premises internally as a comprehensive data management tool, because it is highly adaptable and productive, as well as extremely easy to use, to enable their sales team to quickly and efficiently access – and act on – crucial data and improve everyday tasks. They also customized several features in the application based on their requirement, altering the basic functionalities of Dynamics CRM.

Soon after the implementation, the client started facing issues in managing their large, and complex business data models. They realized that the system had unrealized gains that they were potentially missing out on because the application needed ongoing support. This prompted them to search for a reliable Microsoft partner with good experience in providing Dynamics CRM support and enhancement services to understand and resolve post-implementation pain areas within their system.

After analyzing and understanding the CRM system, the Synoptek Dynamics SMEs recommended migrating, propagating, and populating their complex business data to Dynamics CRM. Synoptek also identified that the client did not have proper presales, and customer handling capabilities and hence proposed a presales solution model as well.

The client also wanted to get real-time reports using data from both Dynamics CRM and Omnia billing system.

Solution and Approach

Synoptek's support approach is designed to manage the client's large and complex data models, and daily financial transactions. It is also designed to optimize their sales process, and in turn automate and enhance their business processes.

The support process involved the following tasks:

1. Data Migration:

Provide data migration services to successfully import data from client's legacy systems to their existing Microsoft Dynamics CRM 2016. Synoptek imported over five hundred thousand records of data from Excel spreadsheets.

Performed ETL-style data migration on key business data entities including account, contact, lead, service location, and opportunities.

- **Field Summary** adds the given information in different entities.
- **Views** provide the list of imported data in these different entities.
- **Relationships** between different fields of different entities have been built.

2. Sales Customization Services:

Synoptek customized the following entities for the telecommunications provider, to redesign the client's entire sales process –

- Account
- Contact
- Lead
- Opportunity
- Service Location (SL) Request
- User

3. Dashboards and Reports:

Synoptek designed and built more than 40 key sales and service dashboards, and reports for all levels of business management.

Since they are real-time dashboards, data is constantly updated. The following types of reports were generated with dashboards:

- **Sales and Service Reports:**
Security rule-wise sales dashboards based on the client's organizational hierarchy allows business users to view their own data. This was done primarily for account, opportunity, and contacts entities.
- **Power BI Reports:**
These reports helped replicate, improve, and add numerous charts, and encourage business understanding of the data. A few examples of

the Power BI reports created for the client include:

- Top 10 At Risk Accounts and Contracts
- Month to Date (MTD) Renewals by year
- Qualified and Unqualified Service Order

Synoptek also worked on establishing coordination between Dynamics CRM and Power BI reporting capabilities.

- Offered advice for database architectural changes and updated raw and complex data.
- Implemented KPIs and reports to identify Top 10 At Risk Accounts and Contracts, Lowest performing entities, and so on.
- Established association between entities such as Distribution Centre, Service Location, Account, Competitors, and third-party providers.

Business Results

Synoptek's CRM experts succeeded in successfully carrying out data migration for the telecommunications provider, which simplified their manual tasks, and completely automated their business process.

Row-level security within sales department hierarchy, and sales process optimization improved adoption and data validation.

Synoptek created interactive and intuitive dashboard/reports with Power BI, allowing users to slice and dice data with various business dimensions. In addition, the business users/executives were equipped with monitoring sales performance and region/market wise revenue details that led to effective decision-making.

Synoptek's CRM experts also worked on aligning the environment between Synoptek and the third-party, as they both were working on a single CRM system, thereby increasing productivity and accountability.

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.