

## Case Study

# Dynamics 365 Customer Engagement Implementation helps a Manufacturing Company to Streamline Sales Processes and Improve Overall Visibility and Efficiency



## Customer Overview

### Customer:

A manufacturing company that provides valves, pipe fittings, and supports, along with related services.

### Profile:

The company offers the industry's most comprehensive portfolio of high-quality, precision-engineered products that is a unique and flexible mix of U.S. and internationally sourced solutions from respected brands.

### Industry:

Manufacturing

### Services:

Dynamics 365 Customer Engagement Implementation

## Business Need

The customer's sales teams were relying on Excel to carry out day-to-day operations. Not only was this time-consuming, but it was also extremely error-prone. With the sales team spread out globally, the lack of a consolidated and centralized CRM system limited visibility into company-wide sales operations and impacted overall efficiency.

Since there were no centralized processes for the sales team to capture account or activity data, decision-making was rather ineffective. With no system to track opportunities or communications, sales professionals failed to prioritize their tasks. To improve go-to-market, they needed collaboration between roles which was largely missing. Also, teams could not get a 360-degree view of accounts, contacts, or opportunities.

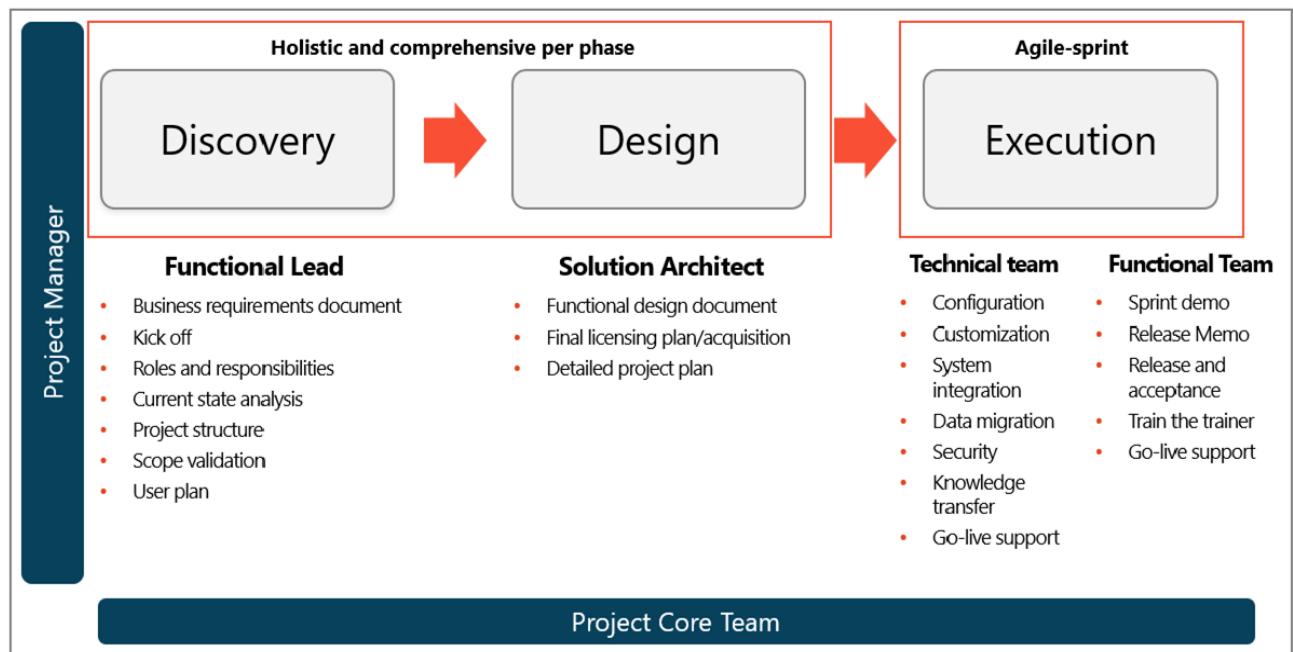
To overcome these challenges and make the sales organization more effective, the manufacturing company began discussions with Synoptek to use Dynamics 365 Customer Engagement (D365CE) for Sales as a CRM tool. The discussion included the implementation of Opportunity Management to replace Excel pipeline docs as a top priority for the organization.

There were also additional requirements for sales opportunities, accounts, dashboards, market segmentation, reporting, and integration with the M3 ERP system.

## Solution and Approach

Synoptek followed a robust three-step process for the engagement. During the discovery phase, we realized that the current sales process contained many legacy applications and processes. We captured processes and future steps and defined required security measures for account/opportunity ownership. We also determined the detailed data migration approach and prepared a robust project plan for execution which spanned data migration, setup, knowledge transfer, go-live, and support.

We conducted the execution in sprints, and as part of each sprint, we ensured necessary user and team acceptance. Each sprint was followed by a sprint demo which showcased all the tasks that were achieved during the sprint.



The engagement included 2 major deployments along with several customizations and integrations.

### Dynamics 365 CRM Sales Module Implementation

To meet the sales requirement, Synoptek leveraged Dynamics 365 CRM Sales module to implement out-of-the-box CRM features and enabled a few customizations required for automation.

- Set up the environment, configured necessary settings for user access, and created required security roles.
- Configured relevance search for core entities to enable the ability to search for Accounts/ Contacts / Opportunities/ Activities.
- Enabled sales teams to log activities, classify the activity types, include details/notes, attach files, add follow-up/due dates, add other individuals, and tie the activity to a customer, contact, and opportunity.
- Enabled the ability to capture “Competitor Organizations” associated with “Accounts” or Opportunities.
- Created custom dashboards for visual reporting which can be leveraged by management, leadership, and sales users.

## Data Migration and Integration

Synoptek was tasked with the crucial responsibility of transferring data from 6 different entities with over 100+ fields, consisting of more than 0.3 million records.

- Migrated major entities like Accounts, PODs, Sales Product Groups, Sales Assignments, Quotes, and Quote Lines by linking all records to their respective entities from the M3 ERP system for seamless transition of data.
- Enabled the ability to see integrated ERP information on customers, add notes, attach, and view associated items.
- Optimized data to ensure it was properly structured and organized for future use.
- Implemented a comprehensive integration system within the CRM platform which allows the company to seamlessly integrate a variety of important customer data, such as account information, billing and shipping addresses, salespeople, and specialist names and details.
- Trained sales users on the newly implemented sales application, including the Outlook addon, product hierarchy, how to create views/charts/dashboards, and how to update the CRM instance with simple field and form changes.

## Business Benefits

The Dynamics 365 CRM implementation has enabled the manufacturing company to:

- Streamline the sales process and quickly identify new opportunities for growth and development.
- Efficiently manage and analyze customer data with more than 100 fields of data being transferred in near real-time.
- Enable users to leverage a more personalized way of viewing sales operations via the implementation of 360 View on Account.
- Ensure access to updated data to make informed decisions via the integration between CRM and ERP systems.

## About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.