

A well-established metal distribution and processing firm in Florida, USA

Reimplementation of Microsoft Dynamics 365 Sales

CHALLENGES



A medium-sized, Florida-based company, that specializes in the distribution and processing of metals, was facing a lot of challenges with their current CRM system. They experienced operational challenges because of their previous implementation which was poorly done and the result of inadequate gathering of requirements, analysis, and system architecture. The system was not efficient in managing sales workflow and fell short of meeting their requirements, which caused lots of operational challenges. The system was inundated with multiple instances of the same accounts and contacts, and each new lead coming through the website's contact form was creating a new account without checking for duplicates. Moreover, the client required the CRM to be integrated with QuickBooks and additional solutions.

BUSINESS CHALLENGES FACED BY THE COMPANY



1

Data Duplicity: Due to the absence of validation checks for new leads, the CRM system was burdened with hundreds of duplicate accounts and contacts.

2

Integration Needs: The system needed integration with the WordPress website and Microsoft 365 products, as well as QuickBooks and other solutions to enhance operational efficiency.

3

Challenges in Lead Management: Ineffective lead management processes were obstructing potential sales opportunities.

4

Customer and Opportunity Management: The current system was not able to efficiently handle customer relations and maximize opportunities.

5

Workflow and Activity Management: The existing workflows and business processes required refinement to optimize activity coordination.

6

Dashboard Configuration: There was a demand for more detailed and customizable dashboards to gain deeper business insights.



Objectives of the Implementation

Zencon Group proposed a complete overhaul of Microsoft Dynamics 365 Sales to achieve the following goals:

Data Cleaning:

Remove duplicate entries to maintain clean & accurate data for precise operations and decision-making.

Customer Management:

Customer relationships to increase the probability of revenue and growth.

Optimized Opportunity

Improve the efficiency of workflows and processes.

Integration with QuickBooks

Allow smooth interoperability for enhanced operational capabilities.

Custom Dashboards and Reports:

Deliver in-depth and actionable insights for the business.

Solutions Delivered: Microsoft Dynamics 365 Sales

Data Cleaning and System Refinement:

- Removed identical data and refined system and custom views.
- Set up & configured dashboards for real-time insights

Integration with WordPress and Outlook:

- Connected the CRM with the client's WordPress website and Outlook for improved lead management and communication.
- This increased sales by reducing the possibility of losing sales opportunities across the platforms.

Enhanced Security Setup:

- Implemented robust security measures to manage two entities with different sales teams under one Dynamics environment.
- Enhanced security translated into enhanced risk management and adherence to data privacy regulations.

Automated Email Notifications:

- Configured automatic email notifications for various stages of the sales process.
- This included follow-up emails for quotes not converted to orders, confirmation emails for new orders, and thank you emails for created invoices.



Conclusion

The client experienced substantial improvements in CRM capabilities and operational productivity by reimplementing Dynamics 365 Sales. The reimplementation of the solution led to clean and accurate data, simplified workflows, seamless integration, increased efficiency, and superior customer management. The comprehensive dashboards and analytical reports delivered crucial insights that helped in decision-making and laying the groundwork for sustained growth and achievement.

BENEFITS OF THE REIMPLEMENTATION



Automation and Efficiency:

Automation and Efficiency: Automated tasks were performed without human interaction which reduced errors to Zero. Integrations bridged gaps in cross-functional communication and eliminated data duplicity.



Comprehensive Customer View:

Provided a 360-degree view of customer interactions and reports.



Improved Productivity and Data Insight:

Automation enhanced productivity and lead-to-customer conversion rates. Improved customer experience led to repeat sales. Accurate sales and employee closure data.