

SOLUTION STORY

BACKGROUND

This customer is an industrial engineering provider.

CHALLENGE

This customer selected PowerObjects to do their initial Dynamics CRM online implementation. They needed a new technology platform because their current homegrown system no longer met their needs. They did not have a standardized process for maintaining their contacts across teams, resulting in some employees having updated data while others did not. They needed a tool that the sales team could use to track opportunities through the sales process.

The customer uses an account hierarchy that is up to four levels deep and utilizes out-of-the-box views to see the activities that are taking place for any given level and the levels below it. The Outlook client is being used to track emails, phone calls, and appointments. By utilizing the Outlook integration, users are able to share contacts and up-to-date information is shared across the organization.

SOLUTION

PowerObjects implemented a system for the customer that was able to standardize their processes and enables managers to have better reporting than what was available before. Custom reports show what activities have taken place for a specified period of time and can be broken down by business units or by opportunity classification.

BENEFITS

This customer also utilized Microsoft CRM for its out-of-the-box marketing functionality in conjunction with PowerObjects' PowerPack, PowerMailChimp. The customer utilizes Microsoft CRM online to track opportunities and standardize processes within the organization.

INDUSTRIAL
ENGINEERING SERVICES
PROVIDER LEVERAGES
CRM TO STANDARDIZE
PROCESSES AND
MAINTAIN
ORGANIZATIONAL
RECORDS.

AWARDS + RECOGNITION

2012 + 2013 + 2015
Microsoft Dynamics Partner
of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft
Dynamics

+++

2009 + 2010 + 2011 + 2012
Inner Circle for Microsoft
Dynamics

+++

3
Convergence Customer
Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft
Dynamics

**POWER
OBJECTS**

Headquartered in Minneapolis

612.339.3355 | 866.770.3355
powerobjects.com