

SOLUTION STORY

BACKGROUND

This customer is a data solution provider.

CHALLENGE

This customer selected PowerObjects to complete a global implementation of their Dynamics CRM platform. Their implementation was comprised of a four-phase approach and was deployed globally for both their sales and marketing teams. This phased approach included replacing SFDC and implementing Microsoft Dynamics CRM, replacing their customer application, integrating a third-party marketing application, and integrating a reporting software.

Before implementing Dynamics CRM, this organization had a number of manual forms and tools that were used to support their sales processes. PowerObjects helped organize streamlining these process through Microsoft Dynamics CRM automation. With newly defined processes and automations, their information is now easily surfaced through reporting and dashboards.

Lead management was a requirement for their Dynamics CRM implementation. It was important that they could easily identify accounts that had not been followed up with for a certain period of time. PowerObjects implemented the existing last activity utility which gave the customer the most recent activity date. The utility triggers on completion of an activity, so when a user wants to find all of the accounts that have not been followed up on within the last month, they can easily view this from an advanced find. This functionality allows the organization to continue to see high-level information and gives them the option to dig in should they need to.

SOLUTION

One of the greatest success factors for this customer was the utilization of dashboard functionality in Dynamics CRM. A number of dashboards were modified to meet the organization's goals including a sales activity dashboard, social marketing dashboard, CRM social overview dashboard, sales dashboard, and a sales performance dashboard. This information allows managers to easily show and report on a number of sales and marketing related activities including scheduled meetings, lead aging, and lead disposition.

In this organization, the collaboration between the sales and marketing teams is key for their Dynamics CRM system. Marketing provides leads to the sales representatives through inbound website leads, outbound marketing campaigns, and events or lists from events. Dynamics CRM is the information hub for marketing efforts and lead creation. The customer increased efforts to cross-sell and nurture throughout the customer lifecycle, extending value-add product offers, and for information about products and promotions. In order to report on the ROI for marketing efforts, the sales team associates incoming leads and opportunities with a source campaign from a marketing activity. On the campaign, the sales or marketing manager can indicate the investment made and dashboards can report on the number of leads coming from each campaign.

The sales department is divided by geography, industry, and account revenue size. PowerObjects implemented the customer's system so that CRM would inherit territory and ownership assignments based on this information. While

*DATA SOLUTION
PROVIDER TAKES AD-
VANTAGE OF DYNAMICS
CRM'S ROBUST DASH-
BOARD AND REPORTING
FUNCTIONALITY*

AWARDS + RECOGNITION

2012 + 2013 + 2015
Microsoft Dynamics Partner
of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft
Dynamics

+++

2009 + 2010 + 2011 + 2012
Presidents Club for Microsoft
Dynamics

+++

3
Convergence Customer
Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft
Dynamics

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SOLUTION |CONTINUED|

an opportunity is open, leads can still come in that need to be associated with that opportunity, so CRM was configured to allow multiple leads to be associated with an opportunity. After the sales process ends, an opportunity is either won or lost. If lost, the sales representative must provide a reason for the loss. By providing a reason for the loss, the customer can gain insight into where or why they lost the sale and can then track any patterns. With some sales processes requiring a quote to be sent during the sales cycle, sales representatives can now generate that quote in a third-party quoting tool and attach that quote to a record in CRM, creating a 360-degree view of opportunity losses and wins and the costs associated to those opportunities.

BENEFITS

A custom screen was created by PowerObjects in phase II of the project to help accurately hedge revenue on a monthly basis. The screen was based on the CRM 2013 platform, and was launched using a control on the custom opportunity entity, which allows senior leaders to run reports each month and forecast the next 30 days. Users can run a report based on location as well. This information shows revenue and commission numbers based on location. These reports and added functionality used SSRS reports and were developed in addition to the custom screen that displays revenue and opportunity details.

An important function of the customer's CRM system was the ability to create lead records in CRM and to create contacts from events, website visitors, and campaigns tracked in CRM as campaign responses. This functionality lets sales and marketing perform correlative analysis based on leads being touched over time and to use CRM to track estimated close dates, percent probability, specific products of interest for opportunities, and other miscellaneous information.

PowerObjects integrated phone calls into Outlook for the implementation. A custom field was added named "Left Voicemail" that allows users to track when they have left a voicemail. A workflow was created to schedule a follow-up phone call for 24 hours later, which is automatically assigned to the owner of the phone call record. Emails can also be created and received via Outlook. The Outlook plugin is utilized to track emails in CRM, so now, if a prospective customer sends an account owner an email regarding a proposal, the account owner can track the email to the related opportunity record in CRM. These custom fields and workflows allow the sales team to do their job more efficiently while still allowing the information to be accessible by others within the organization.

The customer had a goal to leverage information sharing across their sales groups so they could learn from one another. This was achieved through the implementation. Additionally, the management team now has a clear view of information in the system to help them look at trends and manage processes and employees with easily accessible information.



ABOUT POWEROBJECTS

PowerObjects, an HCL Company, is a professional services firm 100% focused on providing service, support, education and add-ons for Microsoft Dynamics CRM.

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