



CASE STUDY

Effective CRM Solution Using MS Dynamics Sales for a Real Estate Company in Australia

Microsoft Dynamics Sales Solution

Efficient Sales solution for smoothened customer relationship management to effectively manage new investors and their investor accounts.



PROTECTED

Client: **Protected by NDA**

Country: **Australia**

Industry: **Real Estate**

About the Client

The client has a real estate business in Australia. They provide investment solutions for institutional and wholesale investors in retail, commercial and industrial assets. Their expertise lies in managing client contracts, communication, investor relations, and compliance reporting.

Challenges

- The client's current resources were ineffective in managing new investors and their accounts
- There was no solution to track new opportunities, and investors
- They were facing difficulties in maintaining the records when the client wanted to make payments in cash
- The clients/investors had no digital access to their account, contact, financial/transaction statements, and other details.
- The client's team had to manually calculate shared dividends, partial buyback, and total buyback shares of the investors when the company released the compensation or bought back the stake.
- The client could not share IPO or transactional information with the investors digitally
- The client could not get the digital signature of the investor on the same IPO contract sent by the company.

Quicks Insights



Challenges

- Ineffective management of new investors and their accounts
- No solution to track opportunities and investors
- Difficulty in maintaining cash-payments records
- The IPO or transaction system was not digitized.
- No solution to get the investors' digital signatures



Solution

- Automated calculation of the Share buyback and Dividend for each IPO
- Automatic sending of IPO contracts and other documents
- A hassle-free digital signature using DocuSign
- A web portal for investors to access their accounts



Result

- Complete automation of the IPO form, to IPO open to Allotments process.
- Automatic calculation of the shares and dividend for the Investors.
- Automated contract related emails
- Online digital signature from the investors.
- Read and manage the IPO information outside the CRM by using Web Portals.



Technologies Used

- Microsoft Dynamics 365 Sales
- Microsoft .NET 4.5 – Custom Plugins
- SSRS Report

Approach

The solution architects at DEV IT, in association with technical and sales experts, sat together to devise an effective strategy that incorporated all the client's needs - the solution had to be user-friendly and easy to use for any layman to leverage it easily. Using MS Dynamics Sales, the solution architects came up with a comprehensive solution catering to the client's needs.

Investment apply and allotment process



Dividend Distribution process



Share Buyback Process



Customer Portal



Solution

- The solution automated the calculation of the Share buyback and Dividend for each IPO for all the Investors.
- We integrated the CRM system with click dimension to automatically send IPO contracts and other documents to all investors.
- Integrated DocuSign with CRM to get the digital signature of the investors online hassle-free
- Created a website portal for the Investors to easily access their accounts, contacts, financial/transaction statements, and other details and make the necessary changes by themselves.

Outcomes

- Complete automation of the IPO form, to IPO open to Allotments process.
- Automatic calculation of the shares and dividend for the Investors.
- Automated contract related emails
- Online digital signature from the investors.
- Read and manage the IPO information outside the CRM by using Web Portals.

About DEV IT

DEV IT is public listed (NSE-DEVIT) organization based at Ahmedabad, India. For more than 2 decades, the organization has evolved into a multi-faceted unit with 1200+ strong, skilled workforce providing cutting-edge software and infrastructure solutions in Cloud, Data and Automation domain. DEV IT provides services to government departments, public sector organizations across several states in India as well as 100s of clients worldwide from diverse industry sectors: healthcare, travel and hospitality, manufacturing, professional services, retail, transportation and logistics and more.



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