

Microsoft Dynamics 365 Implementation for Sales for a Video Print Production Company

Microsoft Dynamics 365 for Sales

Apt CRM solution to smoothen the lead generation process and record data to generate more sales using Microsoft Dynamics 365 for Sales.



PROTECTED

Client: **Protected by NDA**

Country: **China**

Industry: **Video Print Production**

About the Client

The client produces Video Print Products. With a factory based in China, head office in Hong Kong, and sales offices in the USA, Canada, Mexico, Switzerland, Ireland, Netherlands, and the United Kingdom.

Challenges

- It was a hassle for the client to effectively monitor and manage various leads being generated across all their offices
- The client was facing difficulty in communicating with their Sales Offices daily.
- They had to use multiple sources and document their new clients to a designated position
- Their solution did not allow the users to have a user-wise dashboard.

Approach

Our Solution Architects gathered all the necessary data and studied the same to build a holistic solution for the client. After repeated conversations with Dynamics experts, they decided to leverage Dynamics 365 CRM.

Quicks Insights



Challenges

- To monitor leads across various offices manually
- Communication with all the sales offices
- Lead documentation in one single data source
- No user-wise dashboard



Solution

- Sales Management including leads and opportunity management
- Creation of various Workflows to manage the multiple leads and opportunities
- Development of user-wise dashboards to provide a bird's-eye view for each user



Result

- Effective Lead Management
- Better Collaboration with Sales Offices
- Personalized Dashboard for each user
- Integration of leads generated via the website
- Workflow mechanism
- Reminders to use for pending tasks

Solution

DEV IT used MS-Dynamics CRM 2015 to develop/configure the following applications for the client.

- Sales Management including leads and opportunity management
- Creation of various Workflows to manage the multiple leads and opportunities
- Development of user-wise dashboards to provide a bird's-eye view for each user

Benefits

- Leads and opportunities could be managed more effectively wherein no lead/opportunity gets skipped or missed.
- The clientele offices in different time zones could collaborate better with the head office for leads and opportunities.
- Customized personalized dashboards provide bird's-eye views for more efficient and quicker decisions.
- The leads generated through the website were also integrated into the solution. Hence, even those leads could be monitored effectively.
- Leads could get automatically assigned to users in different offices via the workflow mechanism.
- Users could get reminders for all the pending activities via the workflow mechanism.

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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