CRM Implementation - Streamlined Sales Process with Dynamics 365

🎯 Objective

A US-based, chemical research and manufacturing company (specializing in the synthesis of renewable and bio-derived materials), wanted to streamline its sales tracking & pipeline management with automated workflows to improve its overall sales productivity. The company considered need to improvise and enhance the current Dynamics CRM implementation. The customer also sought a CRM system to manage its sales processes but soon needed broader capabilities to manage its projects. As part of this initiative, the company approached Rishabh Software to analyze the existing processes and CRM system.

🤸 Challenges

- Unable to track the current status of leads and next best action
- No follow-up process, leading to the loss of potential customers
- Poor lead qualification & opportunity closure
- Lack of visibility for the commission to be paid to sales executives, agents and agencies
- An absence of automated reminders & escalations
- Manual data entry process leading to high human errors
- Unintegrated multiple systems with a high amount of redundant data

💡 Approach

As our customer needed to address the challenges in their current CRM and enhance their CRM solution, they tried out Rishabh Software's CRM assessment delivery model. This model helped the client refine their current CRM system and implement the right sales automation workflows to maximise team efficiency, accuracy, and quality. Our team analysed the existing CRM system used to manage daily sales orders and proposed to upgrade the Dynamics CRM from 8.2 to Dynamics 365. The team also implemented custom Sales & Delivery modules in Dynamics 365 to deliver real-time status of the sales leads.

The project implementation team consisted of 2 CRM developers and finished the project in 12 months. The highly customised CRM solution reduced the time to lead closure and is able to handle commission management for 1000+ agents.

💲 Business Benefits

- Real-time visibility of lead status
- Connected business processes managed in a single system
- Pricing & Quoting the products becomes smoother through clear visibility
- Cash flow control through timely invoicing processes
- Improved scalability, adaptability & maintainability
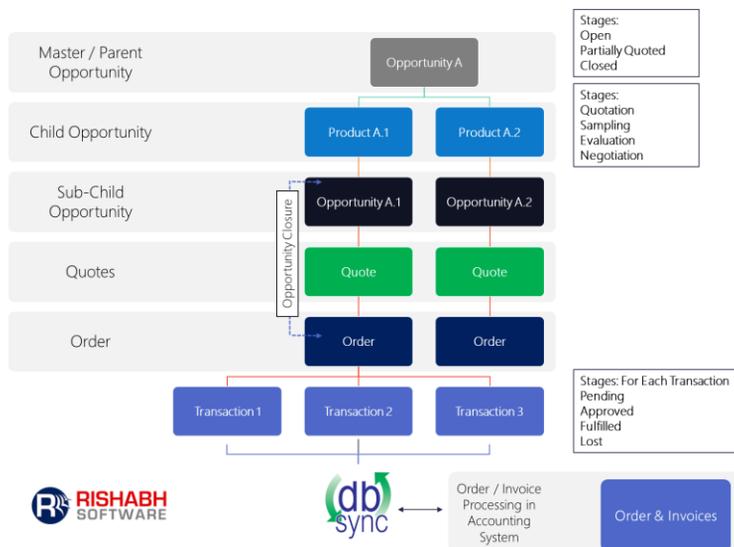
Industry Segment

Manufacturing

Customer Profile

US-based, turn-key chemical research company with 250+ products

Technology and Tools

- Microsoft Dynamics CRM 9.0
- JavaScript
- HTML

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