

# Automating Sales Force & Marketing for Effective Property Management

## Objective

Our customer was using a Microsoft SharePoint based solution to track and manage the property management tasks. Since this system lacked the visibility they required, they wanted to replace it with a right-fit business solution to meet the growing real-estate needs with the primary aim of leveraging the existing investment in the Microsoft Dynamics 365 platform. The new system needed automation of its sales & marketing function to improve the overall business process.

## Challenges

- › Sales & Marketing Automation
- › Improvement in Efficiency
- › Transparency of Data
- › Improved Reporting

## Approach

Our team analyzed the customer's current business processes and selected Dynamic 365 for implementing the Lead(Enquiry) Management, Customer Management, Opportunity Management. The current business process lacked real-time reporting and it required integration with the existing SharePoint solution used by the sales & marketing team.

In order to sync data in real-time between SharePoint & Dynamics CRM, data import manager was implemented to synchronize accounts, leads, contacts, opportunities, and sales orders data points. Moreover, the solution enabled easy access via a Web browser and was integrated with Microsoft Outlook. The solution also helped in:

- › Sales Automation
  - › Manage Contacts and accounts
  - › Improve Time Management
  - › Promote leads to opportunity
  - › Manage sales pipelines
- › Marketing Automation
  - › Generate and send communications
  - › Manage workflows
  - › Create a targeted list
  - › Manage and track costs

From the security perspective, user authentication in Dynamics 365 CRM was done through Active Directory to enable authenticated user accounts to access the system. Dynamics 365 CRM uses a combination of role-based security and object-based security to determine what users can see and do within the application.

## Business Benefits

- › Improved sales cycle by 25% with automating business process flow for Lead and Opportunity Management
- › Customized dashboard design to show real-time visibility of revenues & sales pipeline
- › Faster customer service with Mail Chimp integration
- › Reduced document processing time by 50% with data synchronization between SharePoint & Dynamics CRM

## Industry Segment

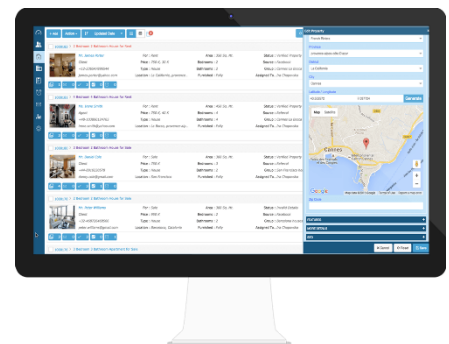
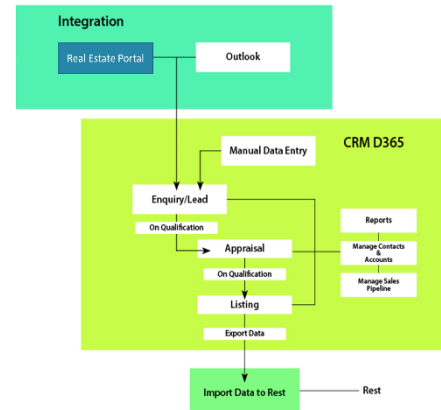
Real Estate

## Customer Profile

Australia based property management service provider, managing over 10,000 real estate properties.

## Technology and Tools

- › Microsoft .NET
- › Microsoft C#
- › Microsoft Visual Studio 2017
- › Microsoft Dynamics CRM



## About Rishabh Software

Rishabh Software is a CMMI 3, ISO9001, ISO 27001, Microsoft Gold Partner & Oracle Gold Partner providing application development services & solutions to mid-sized enterprises globally through our offices in the US, UK and India. We leverage the latest technology stacks in Cloud, Mobile, Business Intelligence and other Enterprise technologies helping clients to get the best value of their IT budget. With our team of 250+ application developers, we have implemented 1000+ successful projects across 24 countries. We work on .NET, Java, PHP, iOS, Android, Oracle, IBM and Open Source technologies.



www.rishabhsoft.com

sales@rishabhsoft.com

US: +1 877 747 4224

UK: +44 207 993 8162