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Dynamics 365 Customer Engagement Implementation Helps an Eyecare Product Manufacturer Enhance Customer-Facing and Revenue-Producing Business Processes

CASE STUDY

Customer: Manufacturer and distributor of protective eyewear

Size: 51-200 employees

Location: Livermore, CA

Industry: Consumer Goods

Profile: The client manufactures and distributes eyewear products and is one of the most trusted brands for on-the-job safety eyewear, high-performance sunglasses, and optical/protective sports eyewear for youth.

Services: Dynamics 365 Customer Engagement Implementation

Business Need

The consumer goods company manufacturers sunglasses, gloves, climate control glasses, and other glasses, as well as parts and accessories for tactical, motorcycle, racing, outdoor, and safety applications for customers across the world. To improve the efficiency of their CRM processes, the client was looking to completely scrap their existing CRM and replace it with Dynamics 365 Customer Engagement solution. They wanted to retain existing data as well while establishing smooth integration between their old CRM and Dynamics 365 Customer Engagement.

In the first phase, the client was looking to implement the Sales module with the Marketing add-on and allow their sales, PIM (Product), and Marketing Teams to get used to the new system. Key drivers of this initial project included:

- Build business unit-wise Lead – Opportunity business process flows

- Enable product storage/utilization in Dynamics

- Enhance Marketing add-on from Leads, Opportunity

- Utilize custom entities structure of Dynamics 365 Customer Engagement to match existing CRM database

- Integrate Customers, Products, and related entities from existing CRM to Dynamics 365 Customer Engagement

Solution and Approach

The client had data spread over in 2 systems – an ERP system and a CRM system which were deeply integrated. Because the client wanted to get rid of their existing CRM and introduce Dynamics 365 Customer Engagement, Synoptek built a robust solution where integration between their existing CRM and Dynamics 365 Customer Engagement works smoothly and the Sales module gets fully utilized. Activities included:

1. *Pulling customers and related entities data from old CRM to Dynamics 365 Customer Engagement*

2. *Pulling PIIM and related entities data from the old CRM*

3. *PIM edit changes pushed back to the old CRM*

4. *Managing Leads, Opportunities, and Activities in Dynamics 365 Customer Engagement*

5. *Managing Campaigns, Marketing Lists, and Offers in Dynamics 365 Customer Engagement*

Dynamics 365 Customer Engagement Sales Module

Accounts - OOB

- Designed forms as per relationship type – Prospect/Customer/Dealer

- Developed Last Activity date functionality to track latest activity date

- Provided A/R and Output screens where users can view financial information of account from old CRM

Accounts – related entities (15+ Entities)

Migrated/Integrated data from old CRM to Dynamics 365

Contacts – OOB

Designed entity as per Synoptek's best practice to hold information of contacts related to Accounts.

Address – Custom

Managed addresses of Bill-to, Ship-to, Lab types of accounts in Dynamics.

Business Process Flows

- Designed and developed business unit-wise BPFs starting from Lead to Opportunity

- Added Approval process on BPF stage of Opportunity

- Triggered email notification to managers/ owner of Opportunity from BPF stage

- Automated Opportunity creation from Lead's Qualify stage without needing users to click on Qualify button

Offer Management - Custom

Managed offers related to Campaigns (OOB) and used in Leads, Opportunities.

Brand Management – Custom

Managed brands related to Products/PIM.

PIM/Product Management – OOB

- Utilized Products in Dynamics 365 with Item Category, Brands, Accessory association

- Designed Form as per existing CRM data entry form

- Designed structure of PIM as per Magento website of client

Manager Approval Flow – Power Automate

Synoptek used Power Automate to create a Manager Approval Flow. On BPF stage in opportunity when the flag value turns to Yes, email notification to Manager of record owner is automatically sent. When the Manager Approves/ Rejects, status field stores value of the response.

Integration/Migration

Synoptek used the KWS SSIS tool to migrate data from the old CRM to Dynamics 365. We also used Rest API Connectors for Data Pull and Data Push.

Server Deployment

Synoptek used Azure to deploy all the integration packages built using KWS.

DocuSign – e-Signature

Towards the end of the project, the client requested for an e-signature feature to send documents for signature from Opportunity. Synoptek

- Sent DocuSign envelopes to contact of Opportunity record

- Populated Account, Address, and Contact Information in the DocuSign envelope documents using custom action of Dynamics

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Business Results

With Synoptek's support, the consumer goods company has been able to achieve a number of business benefits:

- Seamlessly migrated data from the old CRM to Dynamics 365 Customer Engagement

- Automated and standardized workflows for better efficiency

- Ensured robust integration between the existing ERP and Dynamics 365

- Offered teams with a modern, feature-rich CRM and improve their productivity and efficiency.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

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