

## Case Study

# Dynamics CRM Implementation Helps an Agricultural Machinery Company Streamline the Sales Process and Boost Customer Satisfaction



## Customer Overview

### Customer

An agricultural machinery manufacturing company

### Profile

The company is a leading global manufacturer of injection molding, die casting, extrusion, nano-processing machines, and machine tools.

### Industry

Manufacturing

### Services

Dynamics 365 CRM Implementation

## Business Need

The manufacturing company offers a wide range of products, serving a variety of industries, such as the medical, aerospace, job shop, and packaging sectors. But despite an impressive growth journey, it did not have a CRM system. Different teams across different divisions relied on Excel spreadsheets and Word templates to develop proposals in various formats. This led to several inconsistencies from an overall branding standpoint as some customers worked with more than one division.

The lack of a centralized system restricted sales team members to collaborate effectively. As the manufacturer worked with several agencies to sell its products and services, it failed to get the visibility it needed into how the different agencies sell products and where they are in the sales lifecycle.

To overcome these challenges, the manufacturing company wanted to implement a modern, intelligent, and all-encompassing CRM system and:

- Enable internal and external sales teams to leverage a more consistent selling methodology across various divisions.
- Create a partner portal to extend the robust system to agency sales reps and improve sales pipeline management and forecasting as well as customer experience and satisfaction.
- Create a customer portal to enable customer self-service as well as extend visibility to cases, sales orders, and invoices.
- Automate several manual processes and offer omnichannel capabilities to enable a single interface for customer service representatives for inbound emails, cases, and portal comments.
- Improve visibility into cases and enable timely action.

## Solution and Approach

As a partner who has been providing Dynamics FO support, Synoptek was chosen as the preferred provider to modernize various internal systems. To enable a fully-integrated system for Sales, Customer Service, and Field Service while also integrating with the existing ERP deployment, Synoptek engaged with the manufacturer through several months of discovery sessions as part of the pre-sales cycle.

The main objective of these discovery sessions was to develop and demonstrate a Proof of Concept to highlight the capabilities of Dynamics CRM and showcase how the platform meets the organization's unique requirements which served as the foundation for the Synoptek delivery team. Listed below are the various activities carried out by Synoptek:

### **Dynamics 365 CRM Sales Module Implementation**

To meet the sales requirement, Synoptek leveraged Dynamics 365 CRM Sales module to create tailor-made customizations.

- Created different processes for sales opportunity and subscription-based services to streamline opportunity and quote entity.
- Implemented Experlogix tools to simplify the CPQ process and help their sales reps to get proper details.
- Enabled custom quote reports for sales and subscription processes with rich text and high-resolution images.
- Created a custom sales portal for sales reps, allowing them to easily create accounts, contacts, leads, opportunities, and quotes.

### **Dynamics 365 CRM Customer Service Module Implementation**

To streamline customer service, we created a proper routing for cases that assigns cases to users based on the division and the case type. In addition, we

- Created an automated SLA tracker which enables the manager to understand how long it takes for a user to reply to an email and how quickly a case gets resolved.
- Built a Customer Service portal that enables customers to create cases, check progress on their cases and access information about their work orders, quotes, and invoices.

### **Data Migration and Integration**

Synoptek was tasked with the crucial responsibility of transferring data from 26 different entities with over 150 fields, consisting of more than 18 lakh records. With meticulous planning and coordination, we

- Migrated major entities like Work Order and Account by linking all records to their respective entities for seamless transition of data.
- Optimized data to ensure it was properly structured and organized for future use.
- Implemented a comprehensive integration system within the CRM platform which allows the company to seamlessly integrate a variety of important customer data, such as account information, addresses, quotes, work orders, sales orders, among others.

### **Power Apps Implementation**

To enable a tailored experience, Synoptek developed and implemented a Power Apps-based Portal Management app. This Dynamics 365 portal directly syncs all the information from the CRM. We implemented two portals for the manufacturing company: a customer service portal and a sales portal.

- The customer portal allows customers to independently create cases, quotes, work orders, and other items. All newly produced entries automatically update on the CRM instance after being saved, giving the client a hassle-free experience.
- The sales portal has tabs for Leads, Opportunities, Accounts, and other items, allowing their external sales team members to create records via the portal link and have the data automatically reflected on the CRM.

### **Dynamics 365 Field Service Implementation**

Synoptek implemented a Field Service Application to facilitate the provision of onsite services to customers. Dynamics 365 Field Service assists the manufacturing company in directing the best technician for any repairs or maintenance that needs specialized technical abilities. The app can identify technicians with the required abilities, relate problems to specific solutions, and instruct the user on how to carry out a certain task.

We also extended the Field Service Module to a mobile application with offline capabilities, allowing onsite staff to mark services and work orders quickly and easily as completed.

### **Dynamics 365 Remote Assist Implementation**

Synoptek implemented a Remote Assist application to provide customers with virtual near real-time services. The application allows a remote expert to join a one-time connection link and connect with an onsite agent or customer. Agents can share their real-time view with remote experts and get the help they need – while staying hands-free on the Dynamics 365 Remote Assist mobile.

## Business Benefits

The Dynamics 365 CRM implementation has enabled the manufacturing company to achieve several benefits. Today, it can:

- Streamline the sales process, improve customer service, and identify new opportunities for growth and development.
- Keep track of products customers have recently purchased or searched for and provide appropriate purchase alternatives based on their interests to boost the probability of sale.
- Efficiently manage and analyze customer data with more than 150 fields of data being transferred in near real-time.
- Provide more personalized and efficient service to customers via the implementation of self-service portals.
- Efficiently track the first response back to the customer once an automated case has been created and improve the success rate from 50% to 70%.
- Ensure access to updated data to make informed decisions via integration between CRM and ERP systems.
- Complete more service calls per technician weekly and increase first-time fix rates via Dynamics 365 Field Service implementation.
- Optimize service resolution time by centrally scheduling visits, assigning the right tasks to the right agents, and providing customers with precise arrival times.
- Optimize travel and shifts and enable technicians to complete all tasks using an intelligent routing algorithm while also instantly updating asset and work order data.
- Avoid unnecessary travel and reduce costs and delays with remote inspections combining video, screenshots, and annotation ability provided by Dynamics 365 Remote Assist.

## Testimonial



“From a customer service perspective, we have gained the insight and ability to understand what our agents are stating to customers. This ability to look into the case and see what transpired also allows our Customer Relationship Coordinator to tailor short training seminars with some of the customer service agents. During these training courses, they can review past responses and provide another way of handling a situation. Being able to point out a specific situation or example has been very helpful”.

– **Chief Business Operations Executive**

## About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.