

## Case Study

# Dynamics 365 Customer Engagement Implementation Helps a Leading Chemical Supplier to Transform the Sales Process and Strengthen Customer Relationships



## Customer Overview

### Customer:

A leading chemical supplier

### Profile:

The supplier researches, manufactures, and sells specialty chemicals across North America.

### Industry:

Manufacturing

### Services:

Dynamics 365 Customer Engagement Implementation

## Business Need

The chemical supplier was looking to improve its internal sales operations and strengthen relationships with its customers. But the presence of legacy CRM functionality made this impossible to achieve.

Therefore, the supplier wanted to replace the current legacy functionality with Microsoft Dynamics 365 Customer Engagement (CE) application to provide accurate and up-to-date customer data and better serve clients. By doing this, the supplier wanted to pave the path for profitable relationships with new customers while continuing to leverage its existing relationships.

Top goals included:

- Accelerating business growth and capturing the competitive market share by coordinating marketing efforts and lead generation to support field teams.
- Capturing more leads and customer interactions on the go.
- Optimizing customer-facing time by enabling quote-to-order automation while improving performance management and business insight.
- Making reporting and administrative tasks less cumbersome and time-consuming.
- Streamlining account management, allowing reps to spend more time prospecting and acquiring new customers.
- Scaling operational capabilities with more automation by moving to a more self-service business model.
- Building multi-channel capabilities to streamline order management across e-commerce, web, direct, emails, phone, chat, and self-service.
- Improving employee productivity while providing executive management key reports and information using the Dynamics 365 CE application.



### Data Migration and Integration

- Synoptek was tasked with the crucial responsibility of transferring transactional data from 6 different entities for more than 50 fields, consisting of more than 14.1 million records.
- Migrated major entities like Sales Orders, Accounts, Products, Price Lists, Price List Items, and Warehouses from the Sage ERP system for seamless transition of data.
- Optimized data to ensure it is properly structured and organized for future use.
- Implemented an integration system within the CRM platform to allow for seamless integration of important financial customer data, such as Account Billing, Shipping Addresses, Delivery Contact info, Salesperson, Payment Terms, Order and Order Products, etc.

### Customizationst

To meet the unique needs of the business, Synoptek implemented a bunch of customizations:

- Enable an approval process on Accounts and order processing before integrating with the transactional Sage system.
- Create and manage Quotes and generate reports and apply Tax Rules on Products on Quotes and Orders.
- Develop a custom Site Map navigation application to show only relevant entities and views.
- Calculate the final price of Products added to Quotes and Orders.
- Show products available in multiple warehouses before placing and submitting any order.
- Allow users to re-order the same products using previously ordered product selections from the account page.
- Enable a 360 view from the account page, saving multiple page navigations to view and manage Quotes, Orders, Products from Warehouses, Apply Tax and Payment Terms, etc.

## Business Benefits

The Dynamics 365 CRM implementation has enabled the chemical supplier to efficiently maintain its transactional data in D365. Today, the company can:

- Streamline the sales process and growth by quickly and easily creating Orders.
- Leverage a single, unified Sales platform to efficiently manage sales workflows, orders, and invoices.
- Efficiently manage and analyze customer data and ensure real-time data transfer between the CRM and Sage environment.
- Enable users to enjoy a personalized and effective 360-degree view of Accounts.

## 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.