

Case Study

Dynamics CRM Implementation Helps a Home Remodeling Company Achieve a 26% Increase in Sales



Customer Overview

Customer

A Home Remodeling
Company

Profile

The company is a leading
custom home developer in
the United States that offers
services for Windows, Roof,
Solar, Siding, Doors, etc.

Industry

Home Improvement

Services

Dynamics 365 CRM
Implementation

Business Need

This client is one of the largest home renovation companies, offering a wide variety of services in major locations. While its products and services are highly valued by customers, the company struggled with poor management of business processes and customer information. Right from gathering new clients to closing financial contracts, the company relied on traditional software tools that were poorly integrated. Every department used a separate tool to meet its needs and even the smallest set of information was shared using emails and messages. Data storage was also not up to the mark which led to improper data analysis.

All these shortcomings led to substantial hindrances in managing its expanding business. There was no centralization between departments and no automated way of managing finances. The company also depended on other 3rd party vendors to manage their tasks which it had to manually administer at each step.

To better manage its growing business and overcome all the above challenges, the remodeling client was looking to implement an integrated CRM system to:

- Better manage leads and convert those leads to customers in a faster and more effective manner.
- Efficiently run the entire sales cycle from gathering customer information to closing finances.
- Bring all departments under one roof with desired visibility and security levels for better management.
- Integrate all 3rd party vendors into the primary system for real-time data sync and improved tracking.
- Enhance the entire data management and transfer process using the cloud which is accessible and manageable from any place.
- Create advanced reports of different data groups like sales, opportunities, etc. for better forecasting, clear visibility, and better management of the entire business.

Approach and Solution

As one of the most trusted Microsoft partners, the remodeling client chose Synoptek to implement a Dynamics 365 CRM system. Starting from the initial pre-sales cycle to the first phase of go-live, Synoptek made remarkable efforts in understanding the client's business process, communicating with 3rd party vendors, understanding the sales and billing cycle, and interacting with each department to understand their individual needs.

During the discovery sessions with the client, Synoptek showcased a highly user-centric demo of how the Dynamics 365 CRM platform can help in better managing day-to-day sales activities. Being a totally customizable platform, Dynamics 365 CRM had a way to meet the different expectations of different users. A proof of concept was also provided to the client of how dynamic the system is and how effectively it can help enhance the business.

Dynamics 365 CRM Sales Module Implementation

To enhance the overall sales process for the client, Synoptek leveraged the Dynamics 365 CRM Sales module. This module helped the client in better management of sales and finances.

- Created a custom sales pipeline where all potential customers could be converted to actual customers by logging all necessary details.
- Brought the whole finance system in the opportunity entity which displays accurate details of the whole contract for each customer.
- Integrated all the products and services to the sales module with proper configuration.
- Integrated different 3rd party vendors into the module from where they could carry out various actions like credit checks, address verifications, etc.
- Enabled two-way integration of the Leap mobile application for better data transfer and visualizations.

Dynamics 365 CRM Field Service Module Implementation

To streamline field service, Synoptek implemented several elements of the Dynamics 365 CRM Field Service module. These were made available for the users in the sales app itself to make it more user-friendly.

- Setup a proper Schedule Board to provide agents with better visibility of daily booking details where they could take necessary actions from the board instead of going to each record. This made it more convenient for users to manage all the appointments.
- Setup Resources and defined all the financial details that a technician needs, including commissions, payouts, jobs handled, etc. This helped the company to evaluate the efficiency of its technicians and also manage the finances well.

Data Migration and Integration

Data Migration was one of the most crucial parts of the engagement. Data mostly included Accounts, Contacts, Leads, Opportunity, and Appointments. Through proper planning and a structured methodology, we carried out data migration and integration from multiple legacy systems.

- Created 50+ new fields to map the data in proper places.
- Eliminated flaws in source data by cleaning and sorting it and integrating it to the Dynamics 365 CRM platform in a systematic manner.
- Brought over 5,00,000+ data points from various entities which was brought up to CRM from the Hit Tracker system and properly connected each data point to its related records.
- Integrated systems like Credit Pure to manage credit checks of customers, allowing the client to seamlessly transfer data from CRM to the existing app.
- Integrated Smarty Street software to enable easy access to even the rarest customer addresses in the United States.

Business Benefits

The Dynamics 365 CRM implementation helped the home remodeling client witness a 26% increase in sales while enjoying several benefits in their day-to-day operations.

- The centralized CRM system streamlines the entire sales process, helping the client reach out to more customers and bring in more business.
- By bringing all functions under one roof, we helped reduce the number of clicks which accelerated every transaction.
- The simple user interface helps employees leverage modern sales capabilities – without needing any technical knowledge.
- The entirely new financial system helps keep track of financials in each step, thus improving operational efficiency.
- Smarty Street implementation enables sales agents to select the correct address even if they are unaware of the actual address of the customers.
- With CRM implementation, all technicians are now better managed, and their productivity has also increased.
- Improvements in the commissioning system help in motivating the sales force while empowering them to do their jobs with more conviction.

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.