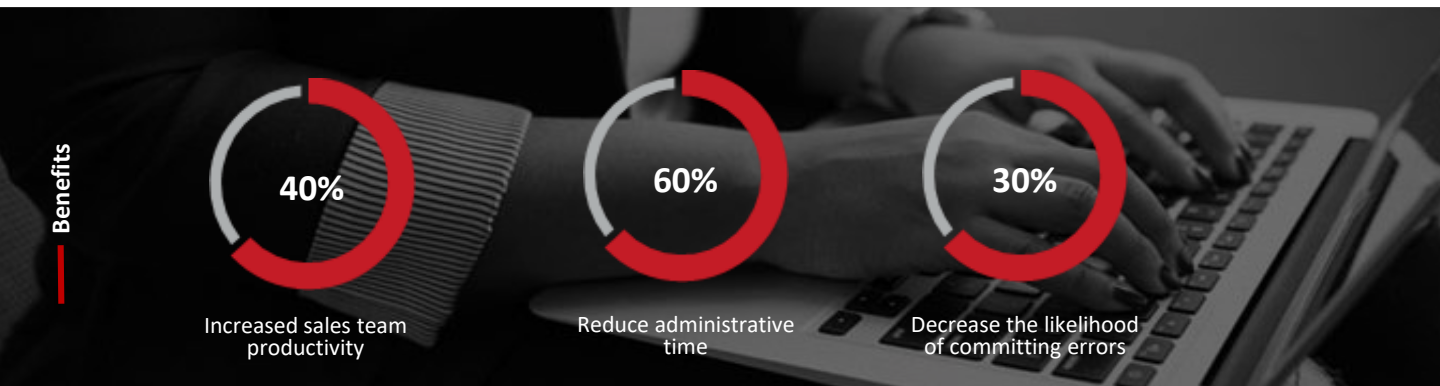


ENHANCING SALES TEAM PERFORMANCE WITH DYNAMICS 365

Industry: IT

Tools: Dynamics 365 Sales hub



Background

The Client is a leading IT company in Europe, existing on the market for more than 10 years, focused on providing an outstanding value to their clients in the USA and Europe. The Client's success comes as a result of the long-standing relationships that they build with the clients, their integrity, and dedication. Their project portfolio includes clients in various industries and sizes.

Challenge

The Sales department of the Client includes more than 5 salespeople responsible for winning, keeping, and maintaining opportunities. As the team gets bigger, so does the need to monitor and keep track of activities increases and becomes a burden. The Client is continuously investing in different ways to empower the sales team with advanced processes to improve productivity, become smarter in the sales cycle, provide customer insights, and reduce administrative barriers. To achieve all this and to facilitate the work of the sales team, there was a need to accomplish several things:

- find a way to identify potential leads
- enable the sales team to focus on important prospects
- gain visibility of email interactions with customers in Outlook and
- keep track of all the important records in a CRM system

Additionally, they needed data on the current situation to create a forecast and predict revenue in the short-term and long-term period. What the client needed was a solution that will provide thorough information on the opportunities and their current status and will enable the Sales Manager to track all related data all in one platform.

SOLUTION

The solution included configuration and implementation of Microsoft Dynamics 365 – Sales Hub. Sales Hub gathers all accounts and contacts information keeps them in one place and enables the sales team to base their decisions on insights. As a robust and scalable solution, the Client could effectively and efficiently manage their sales workload from one place, unify their business processes, calculate the revenues, synchronize it with other applications and get various data reports and dashboards. This application also offers forecasts with the ability to create hierarchy and setting positions which gives the sales manager transparency in the work of each team member and facilitates the work of the entire sales team.

In addition to this, :IWConnect also provided consulting services on how to best apply and use the opportunities offered by Dynamics. Our Dynamics developers with their experience know what are the best practices that should be applied when working with the Sales Hub application. The solution also included process automation solutions that significantly reduce the time it takes to administer tasks and optimize the management of this application.

— Case study

Business Outcomes

By implementing Dynamic 365 - Sales Hub, the client is ensured that all data is in one place all the time.

Key results:

- Automated administrative tasks and reduce the administrative time by 60%
- Decreased the likelihood of committing errors by 30%
- Increased productivity of the sales team by 40%
- Guided, custom business processes which accelerate the closing of the deals
- Availability regardless of the place and time
- Real-time monitoring of results
- Increased team transparency and facilitated sales team work
- Access to real-time insights with built-in predictive analytics
- Secure way to keep and tack all your business-related data