

Enhancing Sales efficiency by Automating and customizing sales processes



Business Challenges

We have a client whose business is connecting customers with reliable contractors offering renovation and construction-related services like kitchen renovation, Interior, roofing, etc. To ensure the reliability of Contractors and for the process of connecting customers with the relevant expertise contractors, there are rigorous evaluation processes that ensure the quality of Projects etc.

They receive hundreds of customers and project inquiries daily, So they were facing difficulties in manually maintaining the data of these inquiries, and due to a large amount of data, it was difficult for them to smoothly implement various processes of connecting customers with the relevant expertise contractors and maintaining regular communication with their customers and contractors.



Solution

We implemented Microsoft Dynamics 365 Sales for real-time access to sales data, enhancing client service with a 360-degree view.



Customized Sales Tables

Tailored to fit the specific needs of the business.



Customized Reports and Dashboards

Provided insightful and actionable data.



Automated Lead Management Process

Reduced errors, increased efficiency, and allowed sales agents to spend more time on client-facing activities. This included:

- Lead assignment notification emails to Agents.
- Setting up the next contact date with leads.
- Establishing a follow-up program.





Integration with Microsoft Tools

Integration with Outlook and Teams streamlined communication and collaboration among the sales team.

Conclusion

Adoption of Microsoft Dynamics 365 Sales transformed company's sales process, addressing their key challenges and driving business growth through improved efficiency, better lead management, and enhanced decision-making capabilities.

