

CRM Project Implementation Case Study
Business Management Apps Used Across Various Key Company Departments
(Marketing, Sales, Operations, & Executive Management Team)
“Became More Agile – Streamlined Business Operations – Increased Revenue”



Business Description and Situation:

- High Tech Manufacturer located in the NJ/NY Area with approximately 75 employees
- Customer was transitioning their business from Research & Development mode to Production/Revenue Generating mode.
- The Marketing Department wanted to track the ROI on their various campaigns & business development activities
- The Sales Department had started to send out quotes, following up to close the business, and needed to track new sales and forecast future new business
- The Operations and Engineering Departments now needed to work closely with the Sales Department to plan out vendors & resources needed to fill the new sales orders
- The CEO of the company was concerned about the speed & efficiency required to manage the company's growth, to fill new sales orders, consolidate departmental business systems & info, and meet the financial projections requested by their investors, on a timely basis.
- The Executive Management Team needed to accurately forecast sales and revenues, to plan out for the new operating expenses related to the company growth, and to also update the investors of the company on the financial health & progress of the company

How This High Tech Manufacturer Successfully Achieved Their Business Goals By Strategically Implementing Next Gen Business Management Apps & Processes (CRM) Across Their Organization.
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- This fast growing/fast business mode changing technology company implemented a single & easy to use business management applications platform (CRM) across key company departments including; marketing, sales, operations/production, and the executive management team.
- Duplication of customer & product data was eliminated across the company, and key departmental teams and executives could easily & quickly access and share company data.
- The Marketing team implemented a campaign tracking & management process that could easily evaluate marketing campaign ROIs and provide performance metrics across the complete customer engagement process and individual stages including; leads generated, quotes created, and sales made
- Customized marketing and sales reports & dashboards were created for the executive management team to easily, quickly, and accurately, view and act upon key business performance metrics including; sales pipeline projections, product & customer profile insights, and the number & dollar amount of closed projects.
- Additionally, the Microsoft's Dynamics 365 CRM application recommended was seamlessly integrated into the customer's existing Microsoft Office 365 applications for Outlook email-calendar-contacts and Sharepoint document sharing. Users were able to easily adopt and use the new familiar CRM application, and increase employee productivity by working more efficiently using just one business management applications platform.