

## CASE STUDY

# Implement a customer relationship solution to control internal sales processes.

**Enable company management to understand the current value of their sales pipeline and to track lead conversion rates.**

### INDUSTRY

Professional Services

### NEED

360 Innovate Ltd are a high-growth start-up business with over 800 customers. A customer relationship solution was needed to manage customer contracts, support agreements, marketing activities and most importantly to track sales opportunities and highlight the performance of the sales team. Information flow amongst key staff is critical in a business with so many customers.

### BUSINESS CHALLENGE

Brantas had to use their knowledge of customer relationship solutions to remove all unnecessary data entry fields and show the sales team how to quickly enter meaningful sales information. We had to customize the solution to be used in a fast-paced and dynamic environment. We knew that our ability to author great reports would be fundamental to our success.

### SOLUTION

The Sales, Marketing and Service modules within Microsoft Dynamics Customer Relationship Management (CRM) solution were customized to facilitate quick data entry. Customized reports were created that allowed company management to get understandable sales information on-demand. Brantas integrated the CRM solution with Microsoft Outlook enabling sales staff to work in a familiar software environment. We also configured the CRM system to be accessed online giving sales staff and management 24x7 access to information.

### RESULTS

- Sales process is now visible to management.
- Customer contracts can be stored in an accessible manner making them easy to locate.
- Customer service levels have improved.
- Repeat business opportunities have increased.

### CORE TECHNOLOGIES

Microsoft Dynamics CRM 4.0  
Microsoft Dynamics Email Router  
Microsoft SQL Reporting Services  
Internet Information Services

**“Brantas knew we needed the job completed by a supplier we could trust and work with again in the future. They did not disappoint and delivered exactly what they committed to us throughout our initial sales meetings. Solid knowledge of their product and our market solved our needs.”**

**Kaveh Aghsaei,**  
Operations Director, 360innovate