

Professional Services CRM Implementation

Client Industry: Audio/Visual, Security & CCTV Sales & Installation
Size: 100+ Employees
Locations: 2 Offices (Maryland & Virginia)



THE CHALLENGE

A company specializing in sales and installation of Audio/Visual, Security, and CCTV products for residential and commercial customers contacted Dataprise Web Solutions in need of a system to improve their sales process, document storage, and inventory management.

In addition to a complicated way of documenting their products for implementation, their sales process was extremely long and tedious due to multiple tasks per stage. A domino effect ensued as result of the unstable inventory management in place. The Finance department suffered due to the inaccurate inventory information that rolled directly into their accounting system. This problem ultimately affected field operations because the information they depended on was frequently disorganized and incorrect.

THE SOLUTION

Dataprise created a solution which dramatically decreased inventory and manual sales management, including:

- CRM system with an automated sales cycle
- Document management by project
- Web-based inventory insight

Dataprise worked closely with the company management team to architect process automation tools that are accessible online and managed centrally through a marriage of Microsoft Dynamics CRM and Microsoft SharePoint.

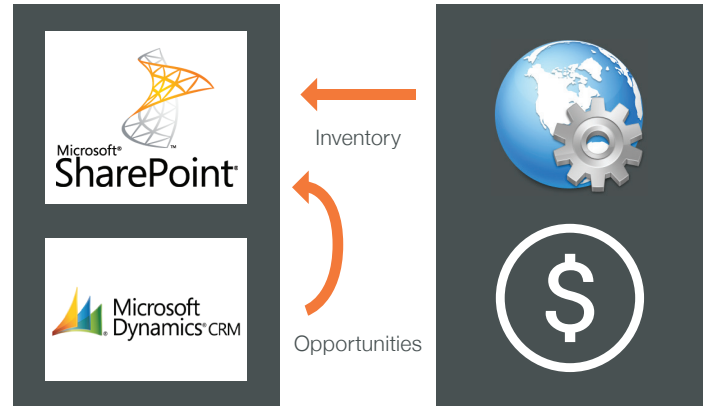
The goal was a one-stop shop to manage all documents necessary from the lead origination through the project completion including quotes, orders, O&Ms, submittals, and more. The tool allows sales, inventory, and installation to work collaboratively with quick access to information needed to make informed decisions.



THE SOLUTION (cont.)

Dataprise implemented Microsoft Dynamics CRM to create a centralized system with an automated sales process. Microsoft SharePoint was added to elevate the document storage needs with an integration between the two systems to automatically setup the necessary libraries within SharePoint as an opportunity was created in CRM.

Furthermore, a web service was created to query the inventory data from the accounting system and an interface was created in SharePoint to allow field employees to quickly view what materials were available in which warehouse.



THE RESULT

The solution allowed inventory and sales to collaborate together, speeding up the sales cycle while lowering the cost to the company. With high staff turnover, the solution allowed for a faster onboarding process and the ability to scale the resources as required.

The solution has resulted in increased profits through a dramatic decrease in sales and project management time.

Dataprise Web Solutions by the numbers:

- Developing SharePoint solutions since product inception in 2001
- 200+ SharePoint implementations
- 600+ developed web parts

