



# Dynamics 365 Cloud CRM Implementation


## Challenge

The client was a fast-growing business that had outgrown its current sales tracking and forecasting tool and needed to make improvements to increase efficiencies. One of the biggest hurdles this client faced was tracking sales data in a modern platform to better target clients and potential clients. The company had fulfillment tracking, but needed to do better with its sales operations, including better segmentation of the information leading up to fulfillment. The client chose the Microsoft Dynamics 365 cloud CRM, but required a partner with the expertise and proven performance to take the next step and have it fully integrated, rolled out, and a salesforce trained in an aggressive timeframe. They chose INSPYR Solutions to partner with in this endeavor.

## Solution

Since the client needed a tight two month turnaround for the implementation, INSPYR Solutions deployed an expert immediately. The solution called for new technologies such as Scribe for integration with their existing on-premises customer systems in order to effectively implement the lifecycle its sales operations required to properly track prospects from the first interaction and throughout customer acquisition and retention. The new tracking included forecasting, sales, and opportunities along with the ability to organize and amplify the client's efforts. This would allow the team to see the pipeline and pivot to drive sales in a meaningful way through remarketing efforts.

INSPYR Solutions chose a specialized team of four to complete this project



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using the Microsoft Sure Step methodology. The team consisted of a project manager, technical lead, application consultant, and technical consultant. In addition to building the new technology to integrate with the existing system in place, INSPYR Solutions also trained the client's staff on Microsoft Dynamics 365 CRM. INSPYR Solutions went a step further and provided training for the client's employees who would maintain the system as part of the engagement, including their IT sales operations associates.

## Outcome

INSPYR Solutions delivered on its promise to build the system in two months and train the client's associates, maintaining our status as a trusted solutions partner. The client's team is ready for the future, having been trained on how to navigate the new system and tweak it to their specifications as new needs arise.

As a result of the new functionality, the client can now track prospects and clients throughout the sales lifecycle, empowering the client's team with the ability to remarket to potential clients and returning clients in order to maximize revenue and profitability.

## Client Profile

The client is a leader among cable TV and broadband electronic equipment providers, with a focus on reselling high performance products from a large number of reliable manufacturers.

The company also keeps abreast of emerging technological applications in the broadband and broadcast fields in order to provide cutting edge solutions to its clients.

With a strong corporate culture that values new technology development and innovation, the client has become a supplier of choice throughout the Americas.

## Technologies Supported/ Created

Microsoft Dynamics 365 Cloud CRM

## About INSPYR Solutions

Technology is our focus and quality is our commitment. As a leading expert in delivering flexible technology and talent solutions, we strategically align industry and technical expertise with our clients' business objectives and cultural needs. Our tailored offerings include a wide variety of professional services, project solutions, managed services, and talent resources, all bolstered by our strategic partnerships with cutting-edge technology services.

By always striving for excellence and focusing on the human aspect of our business, we work seamlessly with our talent and clients to match the right solutions to the right opportunities.

Learn more about us at [www.inspyrsolutions.com](http://www.inspyrsolutions.com).