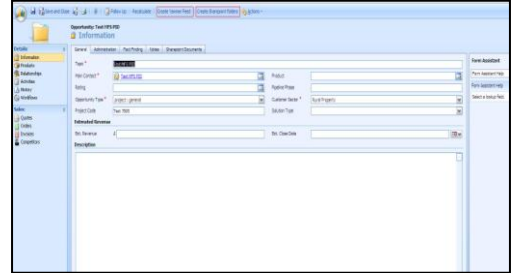




MS CRM System Improvisation

Executive Summary

Companies use CRM across various departments for various purposes. Be it Sales, Marketing, Finance or Customer Service department a good and efficient CRM in place would definitely help a company to grow not only in terms of revenue generated but also maintaining healthy relationship with clients. One of our recent clients understood this importance of CRM and was keen at improving the overall efficiency of their existing CRM system in order to manage their data, better understand and serve their existing and future customers. They approached Mindfire Solutions to analyze their existing CRM system and come up with a proposal to speed up their process. Mindfire's able CRM developer took time to analyze their existing system, figured out the process in which their CRM system operates and proposed the client to automate the entire process in order to achieve a faster experience.



About our Client

Client Biomass Heating Specialist | **Location** Scotland | **Industry** Renewable Energy

Business Situation

The need for a better and faster CRM system aroused when the client realized that they were missing out opportunities. Their competitors were having a competitive advantage as they had an efficient CRM system in place which allowed them to understand the future needs of customers. The client's existing MS-CRM was treated only as a database to maintain records and was not efficient enough to maintain proper relationship with customers.

They wanted Mindfire's experts to analyze their existing CRM system, trace the loop-holes, and suggest an appropriate solution to improvise their system.

Mindfire Solutions analyzed their current process which involved the following:

- On conversion of any lead to opportunities, they allot a unique project code to the record and allocate some series of tasks to the Engineers who do not have any access to the CRM server.
- Emails were being sent manually to the Engineers to inform them about the tasks.
- Once all the tasks get finished, they create Account records on the CRM Server.
- Once the account record is created, they again allocate some series of tasks to the Engineers.
- They create Folders on their share-point server to avail the document management service.
- They also create feeds on the Yammer.com site manually for the new account.

Technologies:

MS-CRM 4.0, Asp. Net, Java Script, SQL Server 2008