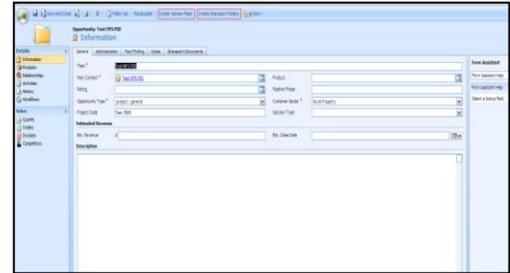




# MS-CRM System Improvisation

## 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.

Mindfire Solutions was approached for its expert MS-CRM services. They wanted Mindfire's experts to analyze their existing CRM system, trace the loop-holes, and suggest an appropriate solution to improvise their system in order to have a robust and highly efficient CRM system in place.

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.



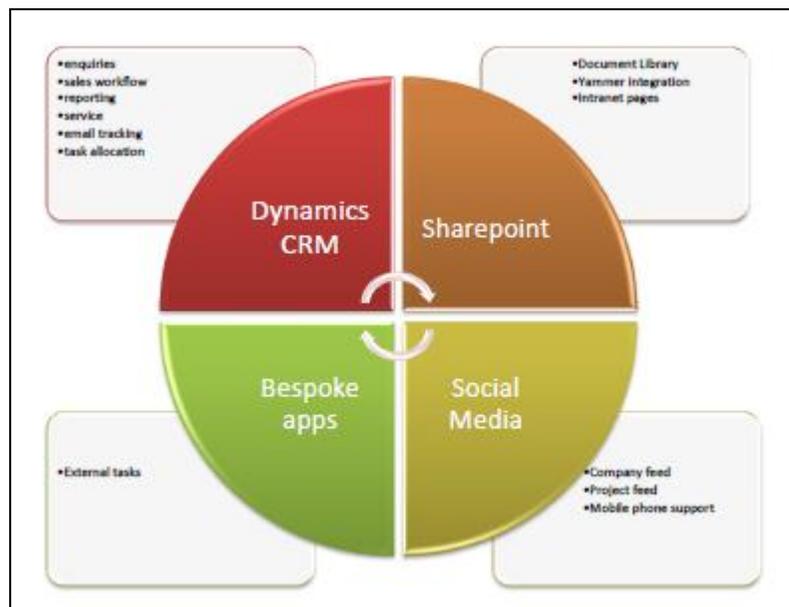
- They create Folders on their share-point server to avail the document management service.
- They also create feeds on the Yammer.com site manually for the new account.

Mindfire Solutions proposed to automate the entire processes there by introducing some customization and salient MS-CRM services.

### *Solution Details*

#### **The Mindfire Solution**

Agreeing to what Mindfire's CRM experts proposed, the client started work. Following the architectural flow prepared by our CRM experts, Mindfire's team developed certain work-flows and databases for their existing CRM system that was required to speed up the process. The detailed developments integrated to the existing CRM system has been listed below:



- System work-flows were developed to be triggered when the opportunity/account record is created.
- System work-flows activities were attached to the work-flow to create the series of tasks.
- An external SQL database was created to store the engineer information (user name, password, email address, full name).
- An I-Frame was developed to populate the engineer name in a drop down and then merged to the MS-CRM task entity. This allowed the tasks to be allocated to the engineers from the CRM Server.
- Email functionality was embedded on to the I-Frames to send out the emails.
- A website (optimized for mobile devices) was developed for the engineers who do not have any direct access to the CRM Server. The engineers can log-on to the website via mobile/computer to view/manage their tasks. The website also provided the bridge to the CRM Server. Through the websites, the engineers could update the status of the tasks which would then update the Server.



- Custom work-flow activity was developed and merged to the work-flow to create Share-point folder inside the share-point server after the creation of the account.
- Custom work-flow activity was developed and merged to the work-flow to create Yammer feed after the creation of the account.
- I-Frames were developed to allow the users to create Share-point folder and Yammer feed manually.
- I-Frames were developed to view/download the documents from the share-point server.

### *Achievements*

This project had a bit of challenge as it involved analysis of an existing process and proposing a solution without tampering the existing system much. Extending the capabilities of the existing CRM system by integrating Yammer and SharePoint site, implementation of an external website to the system for a non-CRM user to gain access to the CRM server, and implementation of some out-of-box CRM functionalities was a tough task for our experts. But, at last they managed well to come up with a more capable and faster CRM system for the client. The functionalities implemented to the system provided a better experience to the user. Listed below are a few:

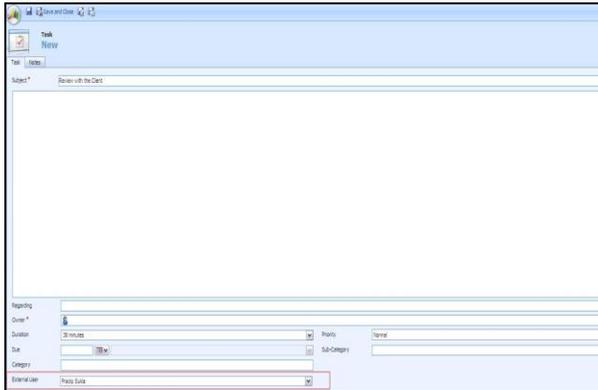
- The **System work-flows** and the **work-flow activities** provided a fully automated process to create/manage the tasks from the CRM Server.
- The **I-Frame** with e-mail functionality to populate the engineer name allowed the CRM user to allocate/notify engineers with the tasks from the CRM server.
- The **Website** allowed the engineer to manage the tasks even from their mobiles which saved a lot of time.
- The **Custom work-flow** activities to create Share-point folder and yammer feed provided an automated way to push data onto the external servers.
- The **I-Frames** to view/download the document allowed users to view the documents from the CRM Server.

### *Technologies*

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



### Final Results Software System



Task Details

Task	Description	Status
Can you phone Paul to confirm back - potential customer	Paul Humphries phoned on 01206 11 and spoke to carline - the call was regarding the Shireside Street Campus	Not Started
Could you phone James Schreiner regarding an enquiry about installing a Bill of Materials	His number is 01289 581228 Think the location is Biggar	Not Started
Start on you call Paul regarding regarding a Bill of Materials for a community hall in Mull	0121 220386	Not Started
TestMailLine6		Not Started
TestMailLine6Rev		Not Started
TestMailLine6L		Not Started
TestMailLine6T	TestOut	Not Started
TestMailLine6D		Not Started
TestMailLine6View		Not Started

Save Logout

### Customer Benefits

The customized system results have clearly shown positive results, better managed information, increased productivity of users, and reduced costs. Due to the automated features, times have been saved by 70% which is remarkable. The website (optimized for mobile devices) continues to benefit the engineers as they can access it to manage/update their tasks.

### Future relationship

The client had a good experience with Mindfire Solutions and was keen at developing an intranet portal for their offices with the same team in place.

