CRM

CASE STUDY

Enhanced CRM Integration Streamlines Lead Generation and Customer Engagement for EPCM

CCS technologies

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ABOUT CLIENT

- **Client:** A prominent EPCM firm in Saudi Arabia.
- **Industry:** Engineering, Procurement, Construction, and Maintenance (EPCM).
- **Products/Services:** Insulation, access solutions, surface protection, passive fire protection, electromechanical services, interior outfitting.
- **Geography:** Middle East and other global markets.
- **Customers:** Clients in various sectors including construction and infrastructure projects.

BUSINESS CHALLENGE

The client struggled with inefficiencies in lead generation and customer management due to a lack of integration with the website's lead generation system and Outlook. The previous CRM system did not support marketing operations, making it difficult to track conversations and interactions. Additionally, data migration was challenging as data needed to be moved to each table.

CCS SOLUTION

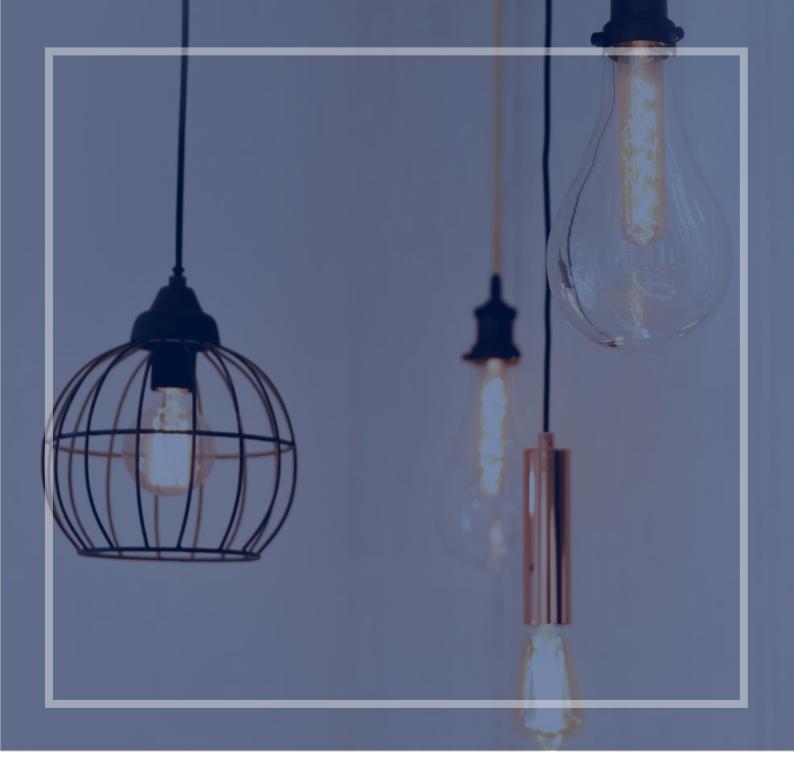CCS provided a comprehensive solution that included:

- **MEED Integration:** Implementing MEED integration with field mapping enabled efficient lead generation, automatically converting website leads to CRM leads through an API connection.
- **Outlook Integration:** Seamless integration with Outlook improved customer follow-up and communication.
- **Task Tracking:** Enhanced tracking of tasks and phone calls, including comments on each activity, improved organization and client engagement.
- **Data Migration:** Utilized SSIS integration for smooth data migration across all tables.

BUSINESS BENEFITS

- **Efficient Lead Generation:** MEED integration streamlined the lead generation process, automatically converting website leads to CRM leads. This resulted in a 30% increase in lead conversion rates and a significant reduction in manual data entry.

- **Enhanced Customer Engagement:** The integration of Outlook with Dynamics 365 Sales enabled seamless communication and follow-up with clients, improving customer engagement and satisfaction by 20%.
- **Improved Task Tracking and Management:** Tracking tasks and phone calls, including comments on each activity, led to a 25% increase in employee productivity due to better organization and task management.
- **Real-time Data Insights:** Integration of Power BI reports with Dynamics 365 Sales provided real-time insights, aiding data-driven decision-making and allowing for a 15% increase in sales performance over time.

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