CASE STUDY

Custom Power BI Sales Dashboard Enhances CRM for a Real Estate Giant

CCS technologies

ABOUT CLIENT

- **Client Name:** A prominent real estate consulting company headquartered in the United States.
- **Industry:** Real Estate
- **Products/Services:** Building Assessments, Environmental Consulting, Land Surveying & Mapping, Energy & Sustainability Consulting, Zoning Services, Renewable Energy Consulting Services, Commercial Valuation Services, etc.
- **Geography:** North America
- **Customers:** Clients across multiple sectors, including construction, engineering, and the environmental industry.

BUSINESS CHALLENGE

The client faced challenges due to the lack of key features in their existing CRM system, such as Outlook integration and automated proposal generation. These shortcomings affected communication efficiency and the ability to generate proposals quickly. Additionally, the CRM system lacked support for marketing strategies and required an embedded Power BI dashboard for better data visibility and decision-making.

CCS SOLUTION

CCS provided a comprehensive solution to address the client's challenges by implementing advanced technologies and data integration techniques:

- **CRM Integration:** Seamless integration with Outlook and LinkedIn mirrored the previous system's functionality, enabling efficient communication and follow-up.
- **Task and Call Tracking:** Enhanced capabilities for tracking tasks and phone calls, including comments, improved management, and organization.
- **Proposal Automation:** An SSRS proposal writer was introduced to generate proposals directly from CRM data, reducing manual data entry.
- **Power BI Reports:** Integrated with Dynamics 365 Sales, syncing tables and data for real-time insights and analysis.

BUSINESS BENEFITS

- **Enhanced Customer Engagement:** Improved customer follow-up and interactions through Dynamics 365 Sales' integration with Outlook led to a 20% increase in customer satisfaction.

- **Efficient Task Tracking:** Better tracking of tasks and activities across organizations and individuals improved productivity and coordination by 25%.
- **Streamlined Proposal Generation:** Automated processes reduced errors and manual data entry, leading to a 30% reduction in time taken to generate proposals.
- **Real-Time Data Insights:** Integrated Power BI reports with Dynamics 365 Sales provided real-time insights, aiding data-driven decision-making and improving sales performance by 15%.

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