

Customer Success Story – SIP Industries – Dynamics 365 Sales Implementation

SIP Industries a Municipal Casting, Utility Fittings, Joint Restraints, and OEM Castings manufacturer based out of the US partnered with CloudFronts to deploy the [Dynamics 365 Sales Solution](#).

About SIP Industries:

SIP Industries (SIP) manufactures, imports, and distributes Municipal Casting, Utility Fittings, Joint Restraints and OEM Castings. SIP is based in Houston, Texas with facilities in the United States, India, and China. SIP was one of the first innovators to globally source municipal castings and utility fittings in the United States. Learn more about them at <https://sipindustries.com>

Business Challenges:

SIP Industries aimed to implement a Sales and Case Process inside the single platform with integration with Construct Connect to provide and have visibilities of Sales using Power BI and CRM Dashboards.

Solution:

To address these challenges, SIP Industries opted for deploying Dynamics 365 Sales with lead generation with CC.

1. Sales Process: We have customized the sales cycle where the sales salesperson can manage the Account, Contact, Opportunities and Quote. Automation has been made to auto-close the quote when any single quote from the Quote has been Won.
2. Case Management: We have implemented the Case Module for SIP so that they can manage all types of cases in a single platform and implemented separate business processes for each type of case.
3. Email Notification: During the Sales and Case process, the user receives the notification based on the business stages so that the user can perform the next setup based on the business process.
4. Activity Tracking: During the Sales and Case Process, the user can create the task, meeting and email from the Sales application to the customer and internal communication.
5. Security Model: We have deployed the security model based on the territory regions
6. Power BI and CRM Dashboard: We have provided the Dashboard for Opportunity / Quote Win report, Case Dashboard and Activities Dashboard to provide the insight of business territory and org wide.

Key Technologies:

Dynamics 365 Sales, Power Automate, Power BI and SharePoint

Post Go-live:

By successfully implementing Dynamics 365 Sales, the client has improved the business process significantly as they have track of all the Process inside the single platform.

In conclusion, the successful implementation of Dynamics 365 Sales at SIP Industries showcases the transformative impact of integrating advanced CRM solutions into business operations. By partnering with CloudFronts, SIP Industries overcame significant business challenges, streamlined their sales and case management processes, and gained valuable insights through enhanced data visibility and reporting.