

# Integrated Sales & Marketing Systems for a IT Services Provider

This was developed for an IT Service provider with Global customers for managing their sales & marketing functions. Currently, they do not have a centralized system to manage their sales/marketing activities, manage contacts, leads, opportunities etc.



## CASE STUDY

### ? BUSINESS NEED

To introduce an Integrated Sales & Marketing System

- For moving the client details & correspondence from individual systems to a central system
- As a centralized contact management system
- For sharing leads / opportunities across the sales functions
- For tracking status of leads, opportunities periodically
- For Centrally managing marketing campaigns and track responses
- To monitor, control and measure the sales & marketing activities

### + VALUE ADD

The key benefits to the organization upon implementation

- Sales/Marketing team schedule/track meetings with Clients
- Dashboards to show real-time status of opportunities and pending tasks
- Centralized Lead & Opportunity management allows sharing/transferring Leads between Sales/Marketing team members
- Defining territory helps management to analyze Opportunity, Sales based on territory
- Campaign management helps to create campaign for targeted audience and get campaign responses for analysis

### 🌐 SOLUTION

Based on MS Dynamics CRM 4.0 introduced which addressed the following direct needs

- Contact Management System to maintain contact information centrally
- Opportunity Management
- Campaign Management to create Email Campaigns and track responses
- Outlook Integration
- Dashboards

### 🔧 TOOLS

Based on MS Dynamics CRM 4.0 introduced which addressed the following direct needs

- Microsoft Dynamics CRM 4.0
- Outlook Client for Dynamics CRM 4.0
- ASP.net 2.0
- Visual Studio 2005
- Microsoft SQL Server 2005



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