



MANUFACTURING COMPANY LEVERAGES D365 IMPROVEMENT PROGRAM FOR GUIDANCE TO OPTIMIZE ENVIRONMENT

A leading global provider of thermal solutions specializes in providing complete flow assurance, process heating, temperature maintenance, freeze protection, and environmental monitoring. They offer modern solutions for industrial heating applications that serve the global energy, power generation, and chemical markets. The company operates in 25 countries with headquarters in Austin, Texas.

Catapult previously worked with the company to implement an intranet solution to improve employee communication and collaboration for their digital workplace. From the project creation to completion, they enjoyed their customer experience and built a strong relationship with the Catapult team.

The company was having some challenges with their Dynamics CRM implementation, which was deployed by another vendor. The stakeholders decided that they needed a partner to help them optimize their Dynamics 365 investment. Catapult was selected to help and extend their IT team once again.

CHALLENGE:

Their Dynamics 365 user group identified several areas of improvement needed to ensure data integrity, enhance the user experience, and deliver a consistent performance. The company's low data quality was due to the lack of formal data policies which created significant record duplication and inaccurate pictures of the customer life cycle. The system integration between the ERP Sales Quotation function, CRM, and email systems did not support business requirements because the pipeline order activities were incomplete. The poor search

capabilities and bewildering array of fields on forms did not reflect the user's needs and contributed to significant user frustrations. In addition, there were no automated workflows which made it difficult for users to complete their job functions in a timely manner. Because the system was unreliable, it caused issues with monthly pipeline forecasting, which is a mission-critical business function.

SOLUTION:

The company needed help reimagining their Dynamics 365 environment for sales, marketing, and operations to address their business priorities. Catapult's multi-phase approach started with an innovation workshop to discover "the art of the possible" and identify near-term transformative activities. The purpose of this workshop was to collect feedback on what was working and learn more about their pain points. A prioritized roadmap for improvements created after the workshop included the following components:

- Creating a single source of truth for customer data
- Achieving an enterprise-wide view of their customers
- Empowering sellers with 360-degree visibility into customer information in real time

After the workshop, the company opted for Catapult's Microsoft Dynamics Improvement Program, a subscription service that monitors and delivers strategic recommendations on a consistent basis. They were paired with a dedicated Dynamics 365 coach plus an entire team of experts who worked with

them to ensure that their line-of-business solutions drive the most value for the organization. Here are some of the key optimizations in our improvement program:

- Assessed the health of the company's data storage and moved archived emails to Azure Blob Storage to free up storage and improve the system's performance
- Rightsized Dynamics 365 licenses by measuring usage and optimized spend
- Increased adoption of technology and encouraged use of existing features in the platform, such as the Dynamics search engine, to help diffuse end-user frustrations

Furthermore, Catapult supported the company's organizational goals around expanding into new verticals by partnering with their marketing team. Together, they identified how to drive growth with the marketing automation tools available in Dynamics 365 Marketing. The teams leveraged platforms such as Dynamics 365 Sales, Scribe, and Power Automate to generate business opportunities and create a path from leads to closing a deal. This was accomplished by modernizing the solution, giving all stakeholders the needed visibility in the sales journey, and encouraging the use of the tools for the new verticals.

RESULTS:

Catapult's Microsoft Dynamics Improvement Program offers the company strategic guidance to optimize their Dynamics and drive continuous value for their organization. Catapult enabled the organization to benefit from a real-time picture of the account status across the enterprise through improved sales, data quality and integration, better automated workflows, an improved CRM user experience, and better overall system reliability. Their Dynamics 365 capabilities will continue to adjust with the business's needs and goals as they change, and Catapult will continue to help them achieve their long-term goals. The Microsoft Dynamics Improvement Program was created deliver

a set of prescribed monthly activities and advisory meetings to keep companies' systems environment healthy and secure. The next step of their journey in this ongoing improvement model is implementing Dynamics 365 Marketing, a toolset intended to build meaningful relationships with customers and prospects with customer-led experiences.

TRANSFORMATIVE IMPACT:

- Improved licensing allocations and usage by right sizing their Dynamics footprint
- Optimized environment to adjust as their business needs and goals change
- Enhanced data quality to create an accurate picture of the customer life cycle
- Increased completion of pipeline activity with system integrations between the ERP sales quotation, CRM, and email systems
- Improved user experience to maximize employee engagement to maintain accurate prospect/customer data
- Stabilized system reliability to create monthly pipeline forecasting, a mission-critical business function
- Improved performance of the Dynamics 365 platform by identifying areas where bottlenecks exist
- Created a more stable platform for their sales, marketing, and operations teams