



## Manufacturer Transforms Sales and Marketing with Dynamics 365 Program

Thermon Inc. is a leading global provider of reliable and safe innovative thermal solutions since the 1950s. The organization 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.

Quisitive previously worked with Thermon to implement an intranet solution to improve employee communication and collaboration. From project creation to completion, Thermon enjoyed the customer experience and built a strong relationship with the Quisitive team so when they needed help with their Dynamics 365 Sales environment, they didn't hesitate to reach out.

After the implementation of Dynamics 365 Sales, Thermon decided that they needed a partner, a Dynamics expert, to help them optimize and improve their customer engagement through sales and marketing channels. Quisitive was selected to help.

### Challenge:

Thermon's Sales and Marketing teams identified priority areas that needed improvement to ensure data integrity, enhance the user experience, and deliver a consistent performance to ultimately enhance the customer engagement. The company wanted to avoid inaccurate pictures of the customer life cycle and needed policies that could help them accomplish that. Another goal was to integrate the CRM, ERP sales quotation function, and the email system to support the business's

requirements to develop an enterprise-wide view of the customer's journey. Furthermore, the team needed to cut down on manual and time-consuming activities to save time and money, as well as reduce technical debt to take advantage of new Microsoft functionality as it is released.

### Solution:

Thermon needed help reimagining their Dynamics 365 Sales and Marketing environment to address their business priorities. Quisitive helped Thermon with a multi-phase approach that 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 was created after the workshop, which 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, Thermon opted for Quisitive's Dynamics Program, a subscription service that monitors and delivers strategic recommendations on a consistent basis. Thermon was paired with a dedicated Dynamics 365 Sales and Marketing coach and an entire team of experts to work with their team and ensure that their line-of-business solutions drive the most value for their organization. Key optimizations in the Dynamics 365 Sales and Marketing program included:

- Created archival/retention process for Dataverse data
- Rightsized Dynamics 365 Sales 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, lead routing engine as well as integrations with Power Automate

Furthermore, Qusitive supported the company's organizational goals by partnering with their marketing team and 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.

## Results:

Qusitive's Dynamics Program offers Thermon strategic guidance to continuously optimize their Dynamics Sales and Marketing environment to improve customer engagement, employee experience, and drive continuous value for the organization. Qusitive enabled the organization to benefit from a real-time picture of the account status across the enterprise through improved system integration, better-automated workflows, an improved CRM user experience, and better overall system reliability. Thermon's Dynamics 365 Sales and Marketing capabilities will continue to adjust with the business's needs and goals as they change, and Qusitive will continue helping them achieve their long-term goals. The Dynamics Program delivers a set of prescribed monthly activities and advisory meetings to keep companies' systems environment healthy and secure. The next step in Thermon's journey is to optimize the use of Dynamics 365 Marketing, a toolset intended to build meaningful relationships with customers and prospects with customer-led experiences.

“The Qusitive (formerly Catapult) team provides excellent consultative service. They are very professional and proactive. They are strategic. They are a wonderful team and we are glad to have them as our partner.”

Natalie Pryor, CRM Manager

## Transformative Impact:

- Improved licensing allocations and usage by right sizing their Dynamics footprint
- Optimized the Sales and Marketing Dynamics environment to adjust as their business needs and goals change
- 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 Sales and Marketing platforms by identifying areas where bottlenecks exist
- Created a more stable platform for their sales and marketing team