



How **Direction Software LLP** helped a leading Real Estate Company Maximize Sales Efficiency with **Microsoft Dynamics CRM**

 **Microsoft**  
DYNAMICS 365  
FOR CRM

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 **DIRECTION**  
Software LLP

## The Client

Mumbai-based one of India's leading real estate developers, continuously strives to create immense value for all customers through its highest quality of services across the real estate industry. Known for launching CineMAX, a chain of luxurious multiplexes, the real estate firm is credited to have developed and successfully delivered over 13 million sq. ft. of commercial, residential, entertainment, education and industrial spaces. Since its inception in 1986, the company's intense focus on service excellence and integrity has earned it the trust of its customers over the last 30 years. In an endeavour to build a better community for a better tomorrow, they strive to upgrade their standard and exceed customer satisfaction.

## The Challenge: Delay in Closure of Leads Due to an Unreliable Sales Pipeline

The success of a firm is no more confined to making a sales number, but providing a differentiated customer experience across all channels. Companies are increasingly looking to sharpen their focus on goals and customer centricity through the process of agile selling. To sell effectively, sales representatives need cutting-edge tools and solutions as well as a centralized system that would help them to automate their workflows and eliminate redundant tasks. The sales team were facing a similar situation as lack of a centralized pipeline led to inconsistent sales processes. A unified pipeline would have given a boost to agile selling and shortened the sales cycle. The sales representatives were not able to get a 360-degree view of the leads due to disconnected business processes. The result: loss in leads and sales opportunities. Here's an overview of the challenges faced by the client:

- Keeping track of leads and managing sales activity in excel files and other database systems was becoming an archaic process that lead to missed or duplicate leads and longer conversion cycles.
- The company was not able to augment sales visibility and communication, while cutting down on repetitive data entry tasks.
- They had planned major launches over the next three years. To cope with the surge in sales activities, the company expanded its sales team. However, the firm lacked an adequate IT infrastructure that lead to manual tracking of processes.
- All dashboards were created manually by extracting data from various Excel files-each of which was locally owned by a sales team head.
- The lead management process was not standardized and hence resulted in delaying of lead closure.

- Follow up tasks were managed manually resulting in loss of valuable leads to competitors.
- The legacy system used being very cumbersome for managing leads resulted in delayed information required to improve sales.

## Executive Summary

### Client

Mumbai's Leading Real Estate Company

### Industry

Real Estate

### The Challenge

Inability to track, manage and close leads due to lack of a unified sales pipeline.

### The Solution

Direction recommended implementing Microsoft Dynamics CRM an avant-garde CRM software solution.

### Technology Used

- Dynamics CRM 2015-On Premise
- SQL Server 2008

### Business Benefits

- A central repository to manage leads (qualified / disqualified) and customers.
- Improvement in sales team productivity with real-time access into customer data.
- Improved sales effectiveness and conversion of leads.
- Improved customer satisfaction levels.

# The Solution: Augmenting the Sales Cycle, the Direction Software LLP Way!

The company sought a fully integrated CRM solution that would help the sales team gain a thorough visibility into its sales pipeline and consolidate all customer-related data. A robust CRM system is a powerful tool for minimizing lost opportunities and augmenting the sales cycle. The company sought help of Direction Software LLP which is known for its extensive domain knowledge in the CRM arena. Direction Software LLP recommended implementing Microsoft Dynamics CRM, an avant-garde CRM software solution for enterprises looking to streamline their business operations and improve sales effectiveness.

Here's an overview of what the new solution provided:

- A unified CRM to manage customer leads and customer interactions was implemented thus giving the management a single system to view customer information.
- Enterprise level CRM was implemented thus bringing all stakeholders on to one platform. The firm was able to identify potential pipeline problems instantly.
- No manual intervention to generate MIS reports. Inventory management was integrated with an ERP software - enabling seamless flow of data between ERP and CRM.
- Automated phone call activity creation in CRM through integration with mobile devices.

## Business Benefits

The association with Direction Software LLP proved to be a desirable one for them and paved way for the real estate firm to capture new vistas of growth.

The solution helped the firm achieve the following measurable benefits:

- A central repository to manage leads (qualified / disqualified) and customers.
- Strong analytical tool for data re-use for future business prospecting.
- Improvement in sales team productivity with real-time access to customer data.
- Improved sales effectiveness and conversion of leads.
- Improved customer satisfaction levels.

## About Direction

Direction is a leading IT Consulting Company offering E-Business Consulting and other Bespoke Solutions on .Net, Java and Open source platforms, a Microsoft Gold Partner practicing Microsoft Dynamics NAV & CRM and also offering Business Intelligence and Mobility Solutions.

Cataloguing an intense and growing portfolio of cutting edge, innovative smart phone based, enterprise and entertainment application, we have leveraged its mark as an International mobile solutions provider for the Retail, Logistics, Banking and Payments, Entertainment, Gaming, Public Services sector, Fashion and Apparel, Telecom Research and Development companies.

Direction builds world-class, applications customized to client specifications for platforms such as iPhone, Android, iPad, BlackBerry and Windows Mobile. Our programmers and designers are honed with around 6+ years of industry expertise, leveraging the latest development tools and techniques in every aspect of the project.