

# MICROSOFT DYNAMICS CRM IMPLEMENTATION

Esher Advisory

## OVERVIEW

### 1. Situation

- ✓ The Digital Marketing team required a robust system to better manage targeted marketing campaigns and improve data flow efficiency. The existing processes lacked the capability to handle data optimally and needed a streamlined approach for effective campaign management. To address this, implementing and customising Microsoft Dynamics CRM was identified as a solution, with a focus on ensuring smooth adoption through tailored training and support

### 2. Task

- ✓ As the project lead, my responsibilities included conducting a comprehensive needs assessment with the Digital Marketing team to identify specific requirements for the Microsoft Dynamics CRM. I was tasked with designing a customised solution that optimised data flows, coordinating with stakeholders to ensure alignment with marketing goals, and developing a tailored training programme to facilitate seamless adoption among team members

### 3. Actions

- ✓ 1. Customisation:
  - Collaborated with key stakeholders to gather requirements, ensuring that the CRM system was tailored to the client's specific digital marketing strategies
  - Customised MS Dynamics CRM by adding bespoke fields and functionalities that catered to their unique marketing needs
- 2. Data Flow Optimisation:
  - Assessed and restructured data flows to enhance the CRM's efficiency in handling digital marketing data, from collection to utilisation
  - Introduced workflow improvements and structural changes to streamline the overall data management process
- 3. Training and Adoption:
  - Designed and delivered comprehensive training workshops to ensure team members fully understood the system's features and could leverage them effectively for their campaigns
  - Conducted hands-on sessions to provide practical knowledge and troubleshoot common issues, supporting a smooth transition to the new system

## 4. Results

- ✔ - Successfully customised the MS Dynamics CRM system, aligning it with the client's digital marketing strategies which enhanced the effectiveness of their campaigns
- Improved the efficiency of data flows, enabling better data management and utilisation for targeted marketing
- Achieved seamless adoption of the CRM system through tailored training sessions, ensuring immediate and effective use by the Digital Marketing team

## 5. Affected parties

- ✔ - C-Suite Executives: Provided strategic oversight and direction for the project
- Sales and Marketing teams: Benefited from improved campaign management and data insights
- Vendor Partners: Collaborated on system development, integration and support
- Data Warehouse teams: Ensured data flow and integrity within the CRM
- Customers: Received enhanced marketing communications and targeted campaigns