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The solution for sales management of leasing products for S Slovensko

How we have made management of S Slovakia´s business processes more efficient

Customers´ profile

S Slovensko, LTD, is a leasing company focused on financing the agro-sector. It is a member of the Association of leasing companies of the Slovak Republic. S Slovensko has been operating on the Slovak market since 2001. Originally, it was a daughter company of the smaller Austrian bank Weinviertler Sparkasse seated in the Weinviertler region. Currently, its exclusive owner is the Austrian bank ERSTE Group Bank AG.

Initial Situation

Originally, S Slovensko had its infrastructure and systems solely on-premise. Employees of the company recorded all the information on customers into the Excel files and ERP system. The ERP system contained all the data on business relationships and various financial data. The company lacked any central system which would store all the data and enable its sharing among the employees.

There was an urgent need for a unified tool for management of the entire sales process of leasing products. The inevitable step the company decided to make was unification of customer information from various sources into one centralized system. Overwhelming number of Excel files was replaced by a solution, which unburdened the company from lengthy work.

Besides, the company wanted to strengthen business activities thanks to marketing activities, what has been reached by mailing campaigns.

Digitalization of business processes helped the customer to replace obsolete systems, which inhibited desired progress of the company. The users are S Slovensko´s employees, namely sales team and back-office team.

Project Objectives

The main goal of the project was to provide the customer with a tool for better and more effective business process. **Among the most important goals belong:**

- implementation of the Microsoft Dynamics 365 Customer Engagement (CRM) cloud solution;
- accommodation of the CRM system for company sales management of leasing products;
- ensuring access to relevant data anytime and from any electronic device;
- ability to record potential as well as existing customers within one system;
- more effective management of business opportunities;
- increased promotion of everyday business activities via mailing campaigns.

Solution Description

As a top priority, S Slovensko needed to digitalize sales process of leasing products. After considering numerous advantages of an online solution, it decided for implementation of the **Microsoft Office 365** a **Microsoft Dynamics 365 Customer Engagement (CRM**). Thanks to the 360-degree view and the customer card, all relevant data on customers are now in hand.

The CRM system provides its users with up-to-date overview of leasing contracts in the aggregated form based on regular data import from the ERP system. At the same time, customer root data and information on business relationships, instalment calendars, guarantees, receivables, KPIs and so on are being transferred from the ERP system into the CRM

The system offers also various types of notifications, which are automatically sent to the sales representative (e.g. inactivity towards opportunities, notification related to an offer and its status, notification on contracts or termination of a contract). System availability via smartphone or tablet is ensured by the Microsoft CRM mobile application for Android and iPhone.

The vital part of the solution is the ProMailChimp add-on, which supplements the business process with marketing activities. It allows simple creation and management of email campaigns. Thanks to the interconnection of ProMailChimp add-on and the CRM system, the whole campaign can be created in CRM environment. All the implemented functionalities contribute to streamlining of business activities and bring expected saving of investments.

Course of the Project

The entire project was managed by the agile methodology. Microsoft Dynamics 365 Customer Engagement was implemented in Microsoft Azure cloud environment.

Based on the customer´s requirements, we have built a system which makes business processes more effective and promotes business activities. To reach the consistency of the business process, one standard business process and flow of tasks and statuses was defined (from lead – through opportunity – to closing the contract). The big role was played by the unified process of preparation, status and evaluation of business cases. Within the project, data on potential as well as existing customers were unified into one system with the set of rules able to assign potential customers to an individual member of the business team. The ProMailChimp functionality is a part of the system, enabling creation of email campaigns.

Used Technologies

We have provided our customer with the following significant benefits:

1. 360-degree view on customers within the new CRM online system providing consolidated and relevant customer data.

2. The customer card providing comprehensive view on all customer data from surveys and field (e.g. financial data, farmed land, objects of financing, grants and agro-information, etc.).

3. Access to data from anywhere and from any electronic device (mobile phone, tablet, etc.).

4. Consistent approach to management of the business cycle, tasks and effective management of business opportunities.

5. List of all opportunities in one place and real time, tracking the pipeline as well as unified process of management, tracking of status and evaluation of business offers.

6. Managerial view on business processes and activities with the possibility of advanced reporting, identification of potential problems within the business processes or tracking set key indicators.

7. Simple creation of email campaigns and their effective management directly from the CRM solution.

17x

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