

# Microsoft Dynamics CRM Implementation for a MultiBusiness

## Client Overview

### Customer

The Customer is a Middle East based group of companies present in the variety of industries including luxury retail, hospitality, and ecommerce. An utmost experience and a tailor-made approach to clients are the cornerstones of the Customer's business philosophy.



## The Challenges

The Customer approached InspiriSYS for a comprehensive solution encompassing efficient customer and operations management.

As a part of a targeted top-of-the-line client service, the Customer needed a loyalty program to award clients by purchase volume and frequency.

Along with improving the quality of client communication, the Customer sought to automate some daily activities. For example, they needed a smart solution for case management to avoid the risk of overlooking client issues due to human error.

Also, the Customer needed a handy tool for efficient operations management to gain greater visibility into daily operations.

## The Solution

To meet all the business needs, InspiriSYS proposed Microsoft Dynamics CRM implementation. The project team focused on two key tasks – to customize the platform in line with all the Customer's requirements and solve the challenge of centralizing data from multiple sources.

Striving to make the customer service personalized for clients, convenient for the staff, and transparent for managers, InspiriSYS came up with the following functionality:

- A comprehensive CRM profile houses available client information delivered by enterprise systems (like contact details, wish lists, orders) and entered by the Customer's team members (like client's character traits, behavioral characteristics, personal style).
- Automated case management is achieved by creating customer service teams in the CRM and adding assignment and escalation rules for case flows.
- InspiriSYS created experience surveys sent to clients automatically after their interaction with companies.
- A two-step loyalty program was implemented to maintain an appropriate level of exclusivity for luxury retail.
- Referrals serve as an internal communication channel for the Customer's businesses.
- The data from a customer profile (full name, gender, contact details, etc.) arrives immediately in the DWH.
- Meanwhile, there are separate staging databases for electronic systems of each company that collect raw transactional data on an hourly basis.

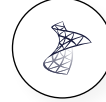
## The Results

With the CRM, the Customer brings their companies under one umbrella. Having their client data centralized and daily processes automated, the Customer upgrades client service within their whole business to a new quality level – team members serve repeat clients and cross-sell more effectively while the risk of human negligence regarding client service is minimized. The Customer builds trust with clients and contributes to their loyalty with bonuses. Business managers get real-time analytics concerning customer management activities and are always up-to-date with current cases, goals, and scheduled activities of their team.

## Tools and Technologies



**Microsoft Dynamics CRM/  
D365 CE**



**MS SQL Server**



**Microsoft SQL Analysis  
Services**



**Microsoft SQL Server Reporting  
Services**