



SOFTWARE COMPANY REIMAGINES SALES AND MARKETING WITH D365

Actsoft offers mobile workforce solutions and user-friendly software such as wireless and GPS tools that help simplify and streamline field operations. These end-to-end solutions enable companies in any industry to collect and process data from employees in the field. By blending user-friendly design with practical business functionality, Actsoft products help increase workforce productivity and reduce operational costs.

CHALLENGE

After 24 years in business, Actsoft made a strategic move in their sales organization and shifted from a B2B to a direct-sales business model. This change required innovation and implementation of modern technologies in sales, marketing, and other business departments to have a successful transformation. The company's CRM system, Microsoft Dynamics on-prem, created data inconsistencies, was difficult to update, had limited functionality, and was expensive. So, Actsoft decided it was time to innovate. Catapult helped Actsoft reimagine their sales, marketing, and operations, and helped migrate their CRM environment from on-premises to Dynamics 365 (D365). Furthermore, Catapult also assisted in the implementation of D365 Sales, D365 Marketing, and the LinkedIn Sales Navigator to integrate departments and improve overall operations.

SOLUTION

Catapult helped the company implement the reimagined Dynamics 365 in three stages. First, Catapult led an Innovation

Workshop to imagine “the art of the possible” and identify the near-term transformative properties. Such transformative properties included: the use of a single pane of glass to view customer data, the use of business intelligence, the migration from on-premises to the cloud, marketing and lead management, and the use of business workflows.

Prior to the Innovation Workshop, the Actsoft executive leadership was contemplating replacing their on-premises CRM with Salesforce. The Innovation Workshop opened their eyes to the “art of the possible” with D365: an integrated view of insights across departments. The Innovation Workshop helped leadership discover not only a financial benefit from moving to D365, but also an adoption benefit. Their team was familiar with Dynamics and moving to Dynamics 365 would bring them more technical value and a shorter technology adoption life cycle, reducing the time of business disruption. The combination of “the possible,” speed to deploy, cost, and ability to meet their client requirements led to Actsoft selecting Dynamics over Salesforce.

Next, in the Envisioning and Planning phase, the team performed a variety of workshops intended to define the high-level requirements and design of the solution in preparation for development. During this process key stakeholders from Actsoft's sales, marketing, and IT teams participated in solutioning workshops facilitated by Catapult. These workshops were a combination of high-level requirements definitions, interviews, and solutions. Twenty activities pinpointed during the Innovation Workshop were defined,

grouped, prioritized, assigned a relative importance versus technical difficulty, and road mapped into a Minimum Viable Product (MVP). The findings of this effort were then compiled into features which were used to build the project plan. In the project plan Actsoft received a written summary of the workshop findings, including scope, constraints, solution functionality, timeline, resource capacity, and high-level requirements.

The Implementation phase was broken down into five milestones. The first two milestones were focused on discovering the solutioning, building, and validating the new sales process and product catalog changes. The following two milestones focused on implementing D365 Sales, D365 Marketing, LinkedIn Sales Navigator, and Outreach IO a sales-enablement plug in. Catapult also supported the transition of current Power BI reporting from on-premises connections to the Power Platform. The technical solution took into consideration all the separate touchpoints of the organization's new and legacy systems. The last milestone was dedicated to those features that needed more attention, including migration, solution installation, and cutover activities.

RESULTS

The Dynamics 365 capabilities align with the business's new selling strategy and is expected to drive more collaboration between sales and marketing, as well as additional revenue and clients. The implementation of D365 brought strategic improvements in process, workflows, automation, and integrations. The change in business model brought Actsoft new challenges, but the migration to D365 and implementation of the additional programs, gave visibility of the customer and product insights needed to succeed in the new direct-to-market sales approach.

Today, the sales and marketing departments leverage data to find insights quicker. D365 helped streamline processes and improve the overall productivity of the sellers. Furthermore, keeping up with the latest Dynamics updates went from taking two months to a matter of minutes, saving Actsoft money, time and headaches.

BENEFITS

- Customer data is shared and unified securely
- Marketing and sales have access to same data under single pane of glass
- Data insights are found quicker
- Marketing and sales activities are automated and streamlined saving time and effort
- Seller productivity and communication improved with customers and team members
- Adapt to business changes quicker



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