Credentials

Client Geography: Mumbai, India

Streamlining Sales, Customer Service, and Marketing Operations for a leading financial services company

Industry: Banking & Finance

About Client/ Context

A leading financial services company based in Mumbai, India, sought to enhance the efficiency of its one of the departments. The primary objective was to implement Microsoft Dynamics 365 to streamline their Sales, Customer Service, and Marketing operations.

This project marked Nebulaa's first venture into BFSI domain, delivering a comprehensive solution tailored to customer's unique business requirements.

Key Technologies

- ► Dynamics 365 Sales
- ► Power Automate
- ► Microsoft SharePoint
- ► Dynamics 365 Customer Service
- ► Dynamics 365 Marketing (Customer Insights – Journeys)
- ► SQL Server Integration Services (SSIS)
- ► Power Platform
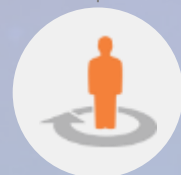
The Challenge

- ► **Manual Processes:** Inefficient manual processes impacted quality output, causing delays and missed deadlines.
- ► **Lack of Tracking:** Absence of tracking mechanisms for information and performance due to manual workflows.
- ► **Third-Party Dependency:** Heavy reliance on third-party tools led to significant investments and dependency on external teams.

Our Solution

- ► **Thorough Analysis & Documentation:** We conducted a comprehensive analysis of existing processes and data, followed by meticulous documentation to ensure a clear understanding of requirements and objectives.
- ► **Intelligent & Scalable Design:** An intelligent and scalable design was developed to reduce future system maintenance needs, ensuring long-term sustainability.
- ► **Data Migration & Integration:** We implemented data migration packages using Kingsway Soft's SSIS Connectors to update Dynamics 365 with data from the backend database daily. This ensured seamless data access for the Sales, CS, and Marketing teams.
- ► **D365 Sales, Marketing & Customer Service:** We delivered 90% of the out-of-the box features along with some advance custom features aligned with customer's business requirements to streamline the operations.

Value Delivered

- ► **Enhanced Efficiency & Accuracy:** Systematic tracking of information significantly improved the accuracy and efficiency of the team.
- ► **Return on Investment (ROI):** Implementing a single system for sales, service, and marketing activities reduced the cost of third-party add-ons.
- ► **Scalability:** The solution's design, utilizing out-of-the-box features and supported customizations, ensures scalability for future growth.