# Credentials

## Dynamics 365 Consulting and CRM Solution Design Services for a Staffing Company

### Industry: Staffing

### About Client/ Context

A staffing company based in California was seeking expert consultants for Dynamics 365 (D365) with extensive experience in sales, operations, marketing, and integrations.

Despite being a D365 customer, the company was dissatisfied with the various freelancers, consultants, and IT partners they had previously engaged.

They needed a reliable and experienced D365 development partner to address their needs comprehensively.

### Key Technologies

- ▶ HubSpot Integration
- ▶ Dynamics 365 Sales
- ▶ Power Automate
- ▶ Microsoft SharePoint
- ▶ Azure Functions and Logic Apps
- ▶ D365 Web API
- ▶ DocuSign E-Sign Integration
- ▶ Custom Web Portal
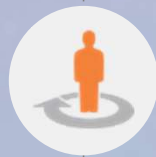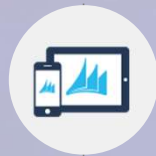
### The Challenge

- ▶ **System Gaps:** The client's existing D365 implementation had significant gaps affecting overall efficiency and user satisfaction.
- ▶ **Integration Needs:** There was a critical need for seamless integration between HubSpot and D365 Sales to streamline sales and marketing efforts.
- ▶ **High Storage Costs:** The client faced substantial cloud storage costs with their current D365 setup

### Our Solution

- ▶ **Gap Analysis and Consultation:** We conducted a thorough analysis of the existing D365 solutions, identifying gaps and inefficiencies. They provided detailed consultations, proof of concepts (POCs), and best practice guidance for D365 implementation.
- ▶ **System Integration:** We implemented a robust integration between the client's marketing system (HubSpot) and D365 Sales. This integration enabled seamless and efficient management and collaboration between sales and marketing teams.
- ▶ **Portal Upgrade:** Understanding the client's business processes, we upgraded existing portal by developing a new, fully functional portal tailored to support company's core operations.
- ▶ **Cost Optimization:** We delivered a custom solution to address the client's D365 storage capacity issues, resulting in significant cost savings. This solution reduced cloud storage expenses by thousands of dollars per month.

### Value Delivered

- ▶ **Enhanced Efficiency:** The integration and upgraded portal significantly improved operational efficiency and collaboration across sales and marketing teams.
- ▶ **Cost Savings:** The tailored storage solution provided by us led to substantial monthly savings in cloud storage costs.
- ▶ **Business Growth:** With the optimized D365 setup, the client was better positioned to scale their operations and drive business growth.