



## HOW SERVICESCALER AUTOMATED A FIRMS SALES PROCESS TO STREAMLINE MATTER CREATION AND ENQUIRY CONVERSION - CASE STUDY

### OVERVIEW

Our client was seeking a solution that could manage their workflow from an initial prospect enquiry; through to the delivery of a service. The solution had to be completely scalable to accommodate their growth aspirations, and automated enough to not require internal administrative overhead to drive the process.

### BENEFITS

With the implementation of Dynamics 365 for Sales, the client now has a fully capable CRM system to capture and manage new business enquiries, manage their referral partner network, assign contacts to marketing lists, report on sales performance, track all communications, and monitor stages of the sales process to ensure nothing ever gets lost or forgotten. Combined with workflow automation, this has enabled the client to convert more clients, without dedicated sales resources.

Want to learn what we can do for your firm? [enquiries@servicescaler.com](mailto:enquiries@servicescaler.com)

### PROBLEM

Our client's challenge was that they wanted to integrate Microsoft Dynamics into their firm's workflows. However, they didn't want each staff member to spend time learning how to use Dynamics nor have access to the confidential information it stores.

### SOLUTION

ServiceScaler configured Microsoft Forms to capture relevant data, then we built Power Automate flows to automatically create CRM records in Dynamics 365 for Sales. Power Automate was then used to drive the sales process based on collected data, automating the administrative steps in the engagement process, through to the closure of the sale and delivery of the service.

### RESULTS

- Staff simply use Forms, eliminating additional software, training and licensing needs
- The sales engagement process is automated by using Forms data,
- Team members do not need access to the CRM but can be engaged in the sales process.