



Case Study

# Improving Sales Force Efficiency with a Cloud-based CRM Solution





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# Abstract

The case study features how FPT helps a leading firm in the field of waste management to improve sales force efficiency with a Cloud-based CRM solution.





# The Customer

Our Customer is a large firm operating in the field of waste management and water treatment. The Company owns a wide variety of factories across Japan.



Previously, the Customer was using an on-premise CRM. Though an on-premise solution offers the Company complete visibility and control over their customer data, it might not operate as expected during the Covid-19 situation. The pandemic has caused businesses to switch to a remote working model almost overnight. In such a context, a cloud-based CRM platform is conducive to systemizing remote sales and catering to customer services processes.

Plus, since the majority of the firm's operations are already on the cloud, the next natural step would be using a cloud-based CRM platform and integrating it into the firm's core system. By doing so, the new CRM platform can automatically send email notifications to stakeholders and automate several manual processes.

After working closely with FPT to evaluate several options for upgrading their CRM solution, our Customer decided to make the switch to Microsoft Dynamics 365. Another major driver to the migration project was to improve the user experience of salespeople and system management staff. Compared to on-premise CRM, Dynamics 365 offers a wider variety of useful features. For example, it integrates seamlessly with the Microsoft Office 365 ecosystem.

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# The Solution

FPT's global expertise in the energy sector, coupled with in-depth experience across Microsoft Dynamics 365 allowed the team to identify the Client's requirements and produce the best execution plan for them.

As some standard functions of the old CRM system were customized to satisfy the Client's requirements, they might not operate as expected in the new system. With hands-on experience in cloud migration, our team manually adjust all the functions that automated tools are unable to cover.

Another crucial component of a migration project is exporting data from the old system. Instead of writing data directly to Dynamics 365, we are determined to use SQL Servier Integration Services to load data into the new system. As the tool is supported by Microsoft, it would ensure a fast and smooth data migration process.

To ensure workflow functionality, we conduct a pilot test in the UAT environment. The test is paramount to determining if the migration satisfies system requirements and helping us to detect and repair any errors before go-live.







# The Results

With the new CRM platform, the Client's salespeople can enjoy a seamless workflow, from receiving customers' requests to finalizing contracts.





FPT Software is a global technology and IT services provider headquartered in Vietnam, with more than USD 500 million in revenue and 16,000 employees in 25 countries. As a pioneer in digital transformation, the company delivers world-class services in Smart factory, Digital platforms, RPA, AI, IoT, Cloud, AR/VR, BPO, and more. It has served 700+ customers worldwide, a hundred of which are Fortune Global 500 companies in the industries of Automotive, Banking and Finance, Logistics & Transportation, Utilities, and more. For more information, please visit <https://www.fpt-software.com>.

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