

Case Study

Auto Extract Systems

Dynamics 365 Sales Quick Start
Implementation

Company and Project Introduction

Operating for over 20 years, Auto Extract Systems is the UK's leading Local Exhaust Ventilation (LEV) company. They are experts in LEV and have helped thousands of businesses create dust and fume free workplaces.

Their mission is being committed to helping clients provide a safer, healthier, and more productive working environment for their employees, with LEV installations and high-quality LEV maintenance services. To achieve this, Auto Extract offer businesses free LEV site assessments so they can thoroughly understand their LEV requirements. They are then able to accurately design a comprehensive local exhaust ventilation system that is tailored to the customer's exact extraction requirements.

Auto Extract Systems were previously using Sage CRM; however this was not flexible enough to meet their needs. Following an enquiry and initial conversations, it was identified that they needed a simple sales solution to help centralise their data, ensure that a pipeline is managed and maintained, and that users can access this data in a friendly and simple manner.

It was identified that the Dynamics 365 Sales Professional licence would be best suited to their needs and we recommended to implement our Sales Quick Start 365 package. This delivers a low-risk, fixed-cost implementation package, which Auto Extract Systems chose as an ideal approach.

Website: <https://www.autoextract.co.uk/>



20⁺ Staff
Company size



8 Users
Solution size

Solution Components

- Microsoft Dynamics 365 Sales
- Microsoft Power Automate
 - Microsoft Licensing
- Dynamics 365 Support Services

Project Summary

Through collaboration and analysis with Auto Extract Systems, it was decided that a simple sales solution would be implemented to start adding value as soon as possible; therefore, Microsoft Dynamics 365 Sales Professional was chosen.

The functionality built within Dynamics 365 Sales ensures that Auto Extract Systems can now identify prospects who may require an exhaust ventilation system, or repair/maintenance of a current system already in place. Dynamics 365 Sales allows users to record the full details of prospects, with all outbound and inbound calls, and data from inbound enquiries such as a web forms.

Strategy 365 also collaborated with Auto Extract Systems to define a sales process that users in the business can consistently follow to help ensure each prospect is managed correctly. The sales process designed in Dynamics 365 Sales is:

- Qualifying prospect > Develop > Site Visit > Quote > Quoted and then the opportunity is closed as won or lost in the system. A user cannot proceed without the required information being completed at each stage.

During the project, Strategy 365 built automation within the Dynamics 365 Sales solution using Power Automate. Sales employees will now receive email reminders about upcoming scheduled phone calls to ensure no key conversation is missed. Also, when a prospect is qualified and assigned to a specific sales employee, an automated cloud flow sends an email to that employee, confirming the prospect has been assigned to them, and a scheduled phone call has been automatically created in their calendar.

Furthermore, Auto Extract Systems now have access to simple reporting and dashboards within Dynamics 365 Sales to give management an overview of their prospects. For example, a dashboard can show the current open enquires and which prospects have been sitting in the pipeline the longest. As this project was delivered using a Dynamics 365 Sales Quick Start package, the solution was built within five working days. To find out more about our Quick Start packages, please click [here](#).

Key Deliverables

- Centralised system for all sales data and processes
- A mapped-out business sales process for users to follow
- Simple-to-use system for users

Benefits

Auto Extract Systems now have a centralised system for the day-to-day management of prospects, which has brought many benefits, including:

- A single, simple system which consolidates data into one easy-to-access location
- A business sales process for sales team to follow ensuring consistent management of each prospect
- Automation of email reminders and scheduled phone calls, saving valuable time and guaranteeing that key meetings with prospects are attended
- Reporting and dashboards available for management to gain insights and highlight trends

“On another note, thank you very much for all your efforts to date. It’s been great working with you and to see this project over the line. I know it’s going to be a great resource and tool for the sales team at Auto Extract Systems!”

Gary Warner, Marketing Manager, Auto Extract Systems