

Case Study

Highpoint Solutions

Sales Quick Start
Implementation



Company Introduction

HighPoint Solutions is an international service company whose technology offerings are continually evolving. They are totally committed to growing longstanding relationships with their customers. They understand that business value begins by developing relationships based on honesty, integrity, and trust; the core principals used to develop the company.

HighPoint Solutions believe that lasting success is a by-product of helping their customers become successful and that digitisation and the transformation it brings isn't always easy, however working with an expert can make the journey more rewarding.

To support, manage and develop these core principles, the Directors of HighPoint Solutions reached out to Strategy 365, a leading Microsoft Dynamics 365 partner, to assist in the implementation of a Microsoft Dynamics 365 Sales solution that would accommodate their current and future demanding requirements. It is imperative that the new solution was scalable, flexible and open. HighPoint have 140 staff in various roles covering management, sales, sales support and engineering. These staff are based in offices across the Globe in the UK, USA, South Africa, Canada and EMEA.

Website: <https://www.highpoint.com>



140⁺ staff
Company size



140 users
Solution size

Solution Components

- Microsoft Outlook to Microsoft Dynamics 365 Integration
- Microsoft Dynamics 365 Customer Engagement
- Import of existing Customer Accounts and Contacts

Project Summary

HighPoint was looking for a UK based Microsoft Dynamics 365 partner to deliver a proof-of-concept solution for their demanding internal customer relations process requirements, prior to delivery of a full solution. The initial challenge for HighPoint was that there was previously no centralised database for the management and reporting of sales opportunities and sales wins.

The Directors of HighPoint determined that the company should move away from historic siloed data capture methods, to a centralised data structure where global sales reports and statistics could be surfaced with ease. As the legacy system had limited controls to manage data duplication, this compounded the difficulties the management team faced when delivering the required sales reports to the Directors.

Following the successful delivery of the proof of concept based on Microsoft Dynamics 365 Sales, HighPoint commissioned Strategy 365 to deliver the full Quick Start project. One of the key components to the success of the project was the Microsoft Outlook integration that allows the seamless tracking of emails from within the users' Outlook to the Dynamics 365 platform.

The new system was also required to capture a single point of truth of the data required by HighPoint to manage all their sales objectives. This data requirement was met by importing the existing Client and Contact data from the existing accounting system to the new Microsoft Dynamics 365 platform while ensuring that duplicated data was flagged and managed appropriately.

A further requirement of the new system was to manage geographical areas that sales staff work and report in. This requirement was delivered by leveraging the Dynamics 365 inbuilt Business Unit model. Essentially Business Units can ensure that all data is held within one database, however the Dynamics 365 user roles applied to individual users limits the Dynamics 365 areas that a user can see or work on. This feature delivered the management requirement to segment sales reports to geographical areas and allow roll-up for global reporting.

The management also needed to monitor and report on all sales leads and sales opportunities within the new solution whilst ensuring that the sales agents followed a pre-defined sale process and information gathering path. This was achieved by creating a bespoke business process flow.

Key Deliverables

- Single point of data truth, around numerous clients, contacts and their associated emails and phone calls.
- Integration of Microsoft Outlook App to all system users.
- Controlled Lead and marketing campaigns process around defined segmentation criteria.
- Territory segmentation for sales reports and analysis.
- Controlled opportunity business process flow to capture essential sales requirement information.
- Group and territory views around campaigns, leads, opportunities and sales pipeline.
- Centralised document storage for capturing any document created during the sales journey.

Benefits

All Client information is now held centrally in Dynamics 365 and is accessible by all licensed users within the organisation. This solution has considerably reduced the amount of effort previously required to manage client information and is now delivering sales customer insight and opportunity management that was lacking in the previous solution.

Additionally, by leveraging the full Office 365 stack, HighPoint is now able to improve their collaboration, security, monitoring and reporting requirements and to improve management of their day-to-day sales activities.

"You've been an amazing partner and we're looking forward to continuing to work with you and your firm. You've surely helped us address some things that were probably right on the line of "in scope" and "out of scope" and we sincerely appreciate all you've done and continue to do to help us make this a successful implementation."

Spencer, Director of Customer Experience, HighPoint