



MICROSOFT DYNAMICS 365 CRM

Connecting Sales, Service and Operations

Industry focus: Industrial Equipment Distribution

BUSINESS OVERVIEW

An industrial equipment distributor serves manufacturers, contractors, maintenance teams and procurement departments. Each deal can involve technical specifications, quotations, stock checks, delivery coordination and after-sales support. Microsoft Dynamics 365 provides a connected workspace to manage customer relationships and coordinate the sales journey.

Project snapshot

Area	Solution focus
Industry	Industrial equipment distribution and B2B sales
Platform	Microsoft Dynamics 365 Sales, with Customer Service capabilities where required
Core challenge	Customer records, quotations, follow-ups and service history spread across separate tools
Primary goal	A consistent customer journey from first enquiry through sale and ongoing support
Delivery approach	Discovery, configuration, data preparation, integrations, testing, training and launch

Executive summary

The sales team handles enquiries from multiple channels and works with long buying cycles, several stakeholders and product-specific requirements. When information is scattered across spreadsheets, inboxes and individual files, teams can struggle to see the full account history, identify the next action or coordinate a reliable handover to service.

The proposed Dynamics 365 environment brings accounts, contacts, leads, opportunities and activities into a structured process. Sales managers gain a shared view of pipeline health, while representatives track opportunities against agreed qualification criteria, quotation milestones and next steps. Where service workflows are in scope, support teams can also access relevant customer context.

Intended business outcome

Create a dependable source of customer information, clearer ownership of sales activities, consistent opportunity stages and reporting that helps leaders prioritize work using current pipeline data rather than manually assembled spreadsheets.

SOLUTION PRINCIPLE

Configure Dynamics 365 around the distributor's real sales and service process. Keep the first release focused on the workflows that matter most, then extend it as adoption and business needs grow.

01 | Business challenges and requirements

Industrial B2B sales rarely follow a simple, one-call purchase path. A prospect may request product details, compare specifications, ask for a quotation, wait for budget approval and return with additional questions. Several people may be involved in the same account, and service history can influence future purchasing decisions.

Key challenges

- Customer and contact details are maintained in different formats, creating duplicate records and inconsistent account histories.
- Enquiries from website, telephone, email and partner referrals need a consistent intake and assignment process.
- Sales representatives rely on personal reminders, increasing the risk that quotations or requests go unanswered.
- Opportunity stages do not always reflect the real buying process, making pipeline reports difficult to compare.
- Managers cannot easily distinguish active opportunities from deals stalled by missing information or delayed decisions.
- Technical questions, delivery considerations and service history may not be visible to every team member who needs them.
- Manual reporting consumes time and can introduce discrepancies between forecasts and underlying opportunity records.

Requirements mapped to Dynamics 365

Requirement	Proposed approach
Central customer records	Use Accounts and Contacts with agreed fields, ownership rules and duplicate-management practices.
Lead intake and qualification	Capture source, product interest, application, location, estimated value and qualification status.
Opportunity tracking	Standardize sales stages, expected close dates, estimated revenue, decision process and next actions.
Activity management	Record calls, emails, meetings, quotation reviews and follow-up tasks against the relevant record.
Sales visibility	Build dashboards for pipeline value, stage distribution, ageing opportunities and forecast periods.
Service context	Where Customer Service is included, relate cases and interactions to the customer and relevant sales context.
Integration readiness	Define approved data flows with website forms, ERP, quoting, email or inventory tools after discovery.

Discovery and scope decisions

Before configuration, confirm the Dynamics 365 licences, user roles, current source systems, data volume, security requirements, sales territories and reporting definitions. ERP, inventory, accounting and advanced quotation integrations should be scoped against actual systems and API capabilities rather than assumed to be included by default.

SUCCESS MEASURES

Establish baseline measures before launch: lead response time, records with an assigned owner, overdue follow-ups, opportunity data completeness, stage ageing, forecast variance and user adoption.

02 | Proposed Dynamics 365 solution design

The design uses Dynamics 365 as the shared customer and sales workspace. Standard capabilities should be preferred where they fit, with configuration and custom development introduced only where a defined requirement cannot be met cleanly through standard functionality.

Core data model and workspace

Component	Role in the distributor workflow
Accounts	Represent customer organizations, contractors, resellers, facilities operators and strategic accounts.
Contacts	Store people involved in purchasing, technical review, finance, operations and service.
Leads	Capture and qualify new enquiries before converting suitable prospects into account, contact and opportunity records.
Opportunities	Track estimated value, close date, product category, buying stage, decision process and next action.
Activities	Keep calls, appointments, tasks, emails and meeting notes associated with the right customer or deal.
Products and price lists	Where appropriate, help standardize product selection and commercial information.
Dashboards and reports	Present pipeline, lead sources, sales activity, conversion, ageing and forecast information.
Customer Service records	If included in scope, connect cases and service interactions with customer accounts and sales context.

Example opportunity stages

New enquiry — Record source, customer, product interest and initial request.

Qualified — Confirm need, fit, buying role, approximate value and expected timing.

Technical review — Validate specifications, compatibility, application requirements and technical dependencies.

Quotation preparation — Confirm product selection, pricing inputs, lead time and approvals before sending the quote.

Quotation submitted — Record quote date, validity period, follow-up date and customer feedback.

Negotiation / procurement — Track revisions, approvals, vendor onboarding, purchasing steps and decision risks.

Closed won / closed lost — Record outcome, close date and reason; trigger the agreed handover for won deals.

Security, data quality and usability

Use role-based security to limit access appropriately, define ownership for accounts and opportunities, agree mandatory fields at the right stages and create duplicate-detection rules. Page layouts and views should surface daily-use fields without overwhelming users. Data migration should include mapping, cleansing, test imports, reconciliation and business approval.

INTEGRATION APPROACH

Website enquiries, ERP or inventory data, quotation tools and email systems should be connected only after documenting the source of truth for each field, sync direction, error handling, permissions and ownership.

03 | Workflow automation and reporting

Dynamics 365 can make routine sales steps consistent. Automation should follow clear business rules and be tested for exceptions, reassignment, incomplete data and duplicate submissions.

Illustrative end-to-end workflow

1. Capture the enquiry

An enquiry arrives through an approved website form, shared inbox, phone entry or partner referral. The record captures source, company, contact details and product interest.

2. Assign an owner

Rules route the enquiry by territory, account segment, product family or team capacity. The owner receives a task or notification.

3. Qualify the requirement

The representative records application, specifications, estimated quantity or project value, timeline and stakeholders. Unqualified leads receive a consistent reason code.

4. Create the opportunity

Qualified leads are converted into the relevant account, contact and opportunity records with an initial value estimate and next action.

5. Coordinate technical and commercial work

Tasks track specification checks, internal reviews, quotation preparation and customer meetings. Information is available to authorized team members.

6. Follow up on the quotation

The quotation date and next follow-up are recorded. Views highlight opportunities with overdue actions or no planned next step.

7. Close and hand over

A won opportunity follows the agreed handover checklist. If service management is in scope, customer context supports post-sale service activities.

Automation candidates

- Create a follow-up task when a new lead is assigned and alert the team if no first activity is recorded within the agreed response window.
- Flag opportunities with overdue activities, missing close dates or extended time in the same stage.
- Require selected qualification fields before a lead can be converted or an opportunity can progress.
- Notify the opportunity owner when a quotation follow-up date arrives.
- Require a closed-lost reason to improve reporting on price, timing, product fit, competition and other factors.
- Create a structured handover task when an opportunity is marked won, subject to the agreed business process.

Management dashboards

Dashboard view	Business question answered
Lead intake and sources	Which channels generate enquiries, and how many progress to qualified opportunities?
Pipeline by stage	What is the current value and volume of open opportunities at each stage?
Ageing and stalled deals	Which opportunities need intervention because they have not progressed?
Sales activity	Are calls, meetings and quotation follow-ups being completed on time?
Forecast and outcomes	How does expected revenue compare with closed results, and why are deals won or lost?

REPORTING DISCIPLINE

Agree metric definitions, filters, ownership and refresh expectations before launch. Dashboards are only as dependable as the data entered and maintained by the team.

04 | Delivery roadmap and expected outcomes

A phased delivery approach lets the business validate requirements early, test with real users and reduce avoidable disruption during rollout.

Suggested implementation roadmap

Phase	Key activities	Deliverable
1. Discover	Process workshops, user roles, current systems, data review, requirements and measurable objectives.	Approved requirements and scope
2. Design	Data model, security, forms, views, stages, automation rules, integrations and reporting definitions.	Solution design and build plan
3. Configure	Configure Dynamics 365, build agreed workflows, prepare dashboards and implement scoped extensions.	Configured test environment
4. Migrate & integrate	Clean and map data, run test imports, connect approved systems and validate error handling.	Reconciled data and tested integrations
5. Validate	Scenario and permissions testing, user acceptance testing, issue resolution and sign-off.	UAT approval and launch checklist
6. Launch & optimize	User training, controlled go-live, support, adoption review and prioritized improvements.	Live CRM and improvement backlog

Expected business benefits

- A shared view of customer accounts, contacts, activities and sales opportunities.
- More consistent lead qualification and opportunity-stage management.
- Clearer responsibility for follow-ups, quotation reviews and next steps.
- Improved visibility into pipeline quality, stalled deals and forecast assumptions.
- Better coordination between sales and service teams when relevant Dynamics 365 capabilities are included.
- A foundation for future integration with website forms, ERP, inventory, quoting and other business systems.

How outcomes should be reviewed

Review performance at 30, 60 and 90 days after go-live. Compare actual lead response times, overdue tasks, data completeness, opportunity ageing, forecast variance and user adoption with the agreed baseline. Use findings to refine fields, automations, training and dashboards rather than relying on assumptions about impact.

Why Liyan IT Solution

Liyan IT Solution supports CRM consulting, implementation, customization, workflow automation, data migration, integration and ongoing technical support. Our business-focused approach starts with understanding how your team works, then aligns CRM configuration and integrations with practical operating requirements.

LET'S DISCUSS YOUR CRM REQUIREMENTS

Planning a Microsoft Dynamics 365 project? Share your current sales process, data sources, reporting needs and the systems you want to connect. We can help define a practical implementation roadmap.

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