

ANGEL O'DONNELL CASE STUDY

Looking to drive growth through a clear customer journey and aligned Sales & Marketing

www.angelodonnell.com

OBJECTIVES

Angel O'Donnell were keen to join up the Sales and Marketing journey for prospective clients, suppliers and other interested parties. This included bringing leads directly into Dynamics from their new website.

Budget was important to them and they were particularly keen to have a fixed price implementation that allowed for some customisations and flexibility.

SOLUTION

Angel O'Donnell opted for Microsoft Dynamics 365 Sales, a CRM platform which is licenced using Dynamics 365 Sales Enterprise. This gave them the following things which will helped to resolve some of their challenges

1. Web form to generate leads from their website into Dynamics
2. Connectivity between marketing interest tick boxes on website and information viewed on lead form
3. Auto conversion to prospect following a set of certain criteria of enquiry
4. Dynamic views to allow prompt engagement with new leads/enquiries
5. Carrying over lead information to new contact once qualified
6. Sales pipeline for new opportunities with close dates and expected revenue
7. Differentiated customer journeys depending on type of business relationship
8. Ability to export contact data with marketing data into Mailchimp to enable email marketing

RESULTS

There is a much clearer customer journey which is supported through Marketing channels into the sales funnel which has led to an expansion of the team.

Having selected Microsoft Dynamics 365 Sales and Support plan, the roll out of this option had a quick lead time and the price was fixed. Following up a few months later Angel O'Donnell are now using the inbuilt optimisation time to create custom views and dashboards to support the team.



AT A GLANCE

CHALLENGES

- Join up Sales & Marketing
- Fixed budget solution
- Web enabled signup

BENEFITS

- Differentiated customer journeys
- Sales pipeline for new opportunities



AMY CROOK

Executive Assistant

"It has added loads to the business. Including better management of marketing. We know there's more to grow into as we are ready to. Really proud of what we have set up."