

# A leading manufacturer of high-quality medical supplies in Florida, USA

*D365 Business Central and CRM implementation*



## CHALLENGES



The client is a leading producer of premium medical supplies in Florida, USA. They wanted to improve sales output and operational efficiency. The organization previously used QuickBooks and a variety of different systems. They were struggling to manage customer service, financial accuracy, and operations. We proposed and implemented Microsoft Dynamics 365 Business Central and Dynamics 365 Sales and Customer Service to handle these problems.

## BUSINESS CHALLENGES FACED BY THE COMPANY



1

### Operational Inefficiencies:

The organization struggled with inefficiencies resulting from using several systems for various purposes, therefore causing mistakes and duplication of work.

2

### Inaccurate Financials:

QuickBooks and other systems did not offer the precision required for financial reporting and KPI tracking.

3

### Customer Service Limitations:

The lack of integration and coordination between systems restricted the client from providing professional customer service.

4

### Sales Productivity Issues:

Limited view of sales operations and scattered tools impacted sales processes.

5

### Employee Transition Difficulties:

Employees suffered inefficiencies and friction when switching between several platforms.

# Objectives of the Implementation

With the following goals in mind, Zencon Group proposed a complete solution to address the challenges faced by the organization:

## Boost Operating Efficiency

Simplify processes and reduce mistakes through integrated solutions.

## Improve Financial Accuracy

Boost financial accuracy by means of detailed reporting.

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## *Solutions Delivered:* **Microsoft Dynamics 365 Business Central and Sales/Customer Service**

### Business Central Implementation

- Improved finance, inventory, sales, marketing, procurement, project management, and warehouse management.
- Integrated True Commerce EDI for efficient order processing, improved shipping and logistics, warehouse systems, automated financial reconciliation, and payroll processing.
- The solution enhanced communication and scheduling and provided standard and custom Power BI reports for advanced data analysis.

### Sales/Customer Service Implementation

- Implemented standard features including an account dashboard, outbound email campaign management, visitor tracking, lead generation, and customer quote management.
- Integrated with Business Central for smooth data flow and Outlook for improved email and calendar integration.
- The combination of these features and integrations simplified CRM processes and boosted overall productivity.





## Conclusion

Microsoft Dynamics 365 Business Central and Dynamics 365 Sales/Customer Service provided the client with a complete solution to increase operational efficiency, financial accuracy, and sales productivity. The integration of multiple systems enabled professional customer service and streamlined processes, positioning the business for ongoing development and long-term success. Microsoft Dynamics 365 Business Central and Dynamics 365 Sales/Customer Service helped optimize operations, improve financial management, and enhance customer interactions, ensuring a scalable and future-ready business environment.



**30%**

Increase in  
Operational Efficiency



**99%**

Data Accuracy  
Achieved

## BENEFITS OF THE REIMPLEMENTATION



**Improved Efficiency:** The combined implementation of ERP & CRM simplified operations and reduced errors.



**Improved Financial Accuracy:** Accurate financial data and KPI tracking were attained, therefore supporting better decision-making.



**Increased Sales Productivity:** More efficient processes led to improved sales productivity and better visibility of sales activities.



**Professional Customer Service:** Better integration and more simplified processes resulted in improved customer service.



**Simplified Employee Transitions:** Reduced duplication of efforts and simplified transitions between software systems.