

Unifying Sales, Marketing, and Services with Microsoft Dynamics 365 for a leading US Education Service Provider



Case Study





About the Client

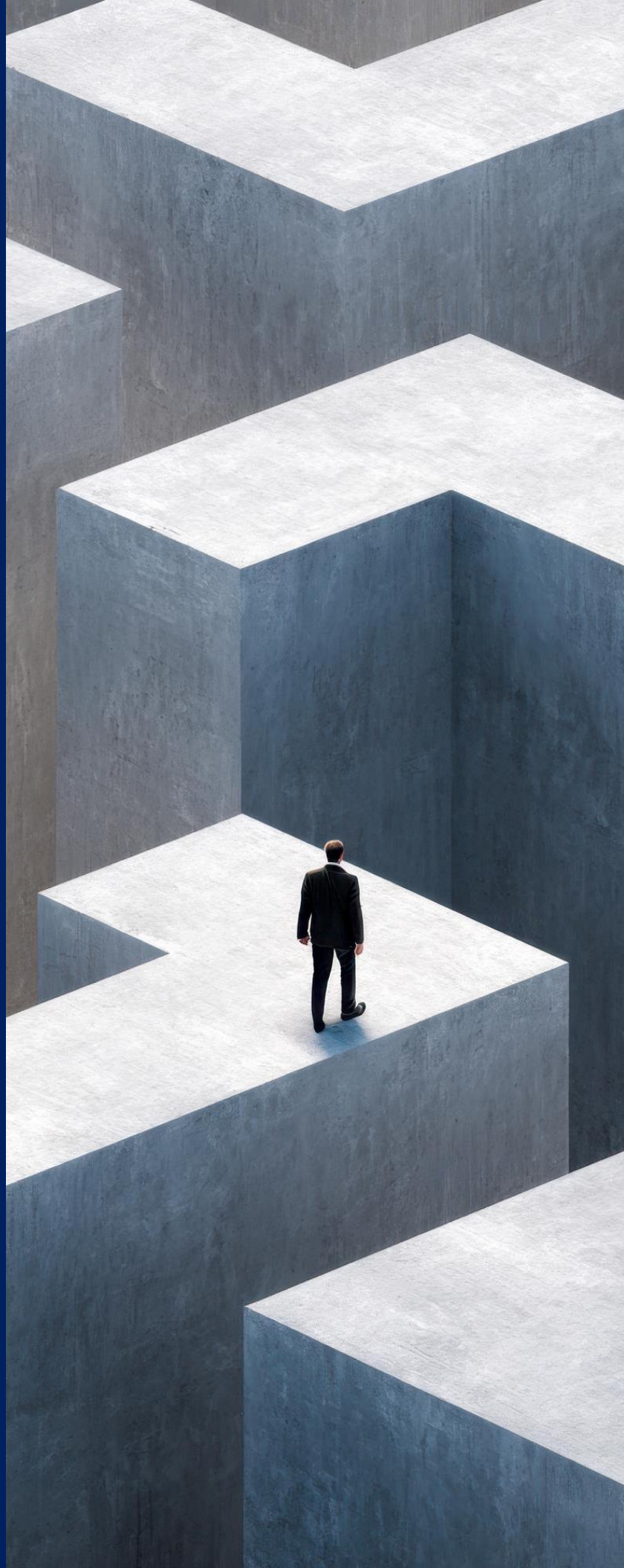
The client, a leading education service provider in the United States, struggled with a slow legacy system that could not support its global growth. The client wanted to replace their ageing system with a flexible CRM platform to improve efficiency, enhance engagement, and make data-driven decisions. The goal was to develop a robust and dynamic platform that supports global business demands and delivers seamless customer service across their preferred communication channels.



Challenges

The client faced several challenges across admissions, student engagement, and operations. Some of the key challenges included:

- An outdated system that was not flexible to meet the evolving business needs.
- Insufficient reporting capabilities to understand individual customer preferences
- The call handling was slow, increasing Average Handle Time (AHT)
- High dependency on multiple external integrations increased the risk of system outages
- Reporting was fragmented and lacked visual clarity, hindering effective decision-making





Solution Provided

To help the client, Infinite chose Microsoft's Dynamics 365 CRM platform, which offered a robust system to meet business demand and support global locations. Some of the key work included:



Built a new custom framework for data migration from the existing system to Dynamics 365



Extended Dynamics 365 CRM application by writing Plugins and Custom workflows



Built an API Integration Framework for integrating applications outside Dynamics 365



30% customization using PowerApps, business process flows & Power Automate to meet the global business requirements.



Created detailed reports for a better understanding of individual customers' preferences and leveraged AI to help automate quotes



CTI Integration with Dynamics CRM to move call handling functionality to Dynamics 365 CRM to reduce AHT \



Developed a resilient integration architecture to manage high-volume external (to Dynamics CRM) integrations, ensuring high availability and minimizing system downtime.



Implemented Power BI integration for reporting



Business Benefits



Delivered a personalized and connected customer experience across channels



Supported 150,000+ transactions across marketing, sales, and services per month with a 15% YoY Growth



Improved agent productivity with real-time intelligence, recommendations, and sentiment analysis



Provide customers with immediate access to the right content and knowledge articles





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