



Fuller Landau checks in on a fully-integrated system and gains 360-degree view of their sales pipeline using Microsoft Dynamics 365 for Sales



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Fuller Landau is a leading mid-sized strategic audit, accounting, tax and advisory firm with offices in Toronto and Hamilton. Catering to the mid-market, Fuller Landau is committed to helping owner-managers and entrepreneurs build value, grow their business, and generate sustainable results.

Fuller Landau has recently expanded their services to include business valuation, litigation support, forensic accounting, restructuring, corporate

finance, mergers and acquisitions, family office services and succession planning.

WebSan Solutions provided Fuller Landau with Microsoft Dynamics 365 for Sales implementation including integration with their billing system, Outlook add-in, custom workflows and field security.

## Challenges

Fuller Landau has been experiencing significant growth over the past 5 years and needed a solution that can help manage relationships with clients, prospects and centers of influence. They lacked a centralized database for their contacts, making it difficult to create and maintain targeted marketing campaigns. To add, the company was manually monitoring their sales pipeline which proved to be tedious and time-consuming.

## Solution

WebSan was hired by Fuller Landau to help integrate Dynamics 365 for Sales with several other systems, manage the implementation process and to consolidate data. WebSan also provided training to various user groups.

## Results

WebSan helped Fuller Landau successfully implement Dynamics 365 for Sales, integrate it to their other systems, and improve upon their sales process.

“We really liked how WebSan managed the implementation process. Andrew and his team really took the time to understand our current situation, the challenges we were facing, and what we were hoping to get out of a CRM system. The implementation process was clearly laid out, with assigned tasks and deadlines, so we knew exactly what to expect. I'm not going to lie –

implementing a CRM system can be a painful process, especially if your data is disorganized, incomplete, or scattered across multiple systems. But the finished product is worth it, and the team at WebSan is fully equipped to get you there,” states Aimee Morita, Director of Marketing.

## Benefits

Fuller Landau now fully uses Dynamics 365 for Sales and has a system that houses their contacts', prospects', and customers' information in one centralized environment. Through Dynamics 365 for Sales, the team can now carry out targeted marketing campaigns and have a 360-degree view of their sales pipeline both in the office and on-the-go. The team was able to significantly reduce time inputting leads and tracking their sales. To add, custom dashboards and views to extract data acted as a reporting tool that provided real-time data to be reflected.