

Patlon soars with efficient report generation and improved communication management using Microsoft Dynamics 365 for Sales



www.patloncanada.com

Patlon Aircraft & Industries Limited has been one of Canada's leading representatives for global manufacturers of custom components and systems for the aerospace and military markets for over 50 years.

Patlon also offers a full range of value-added services including assembly, field installation, training,

calibration and testing, in-house repair and overhaul and warranty services.

WebSan Solutions provided Patlon with an integration of Dynamics 365 for Sales with Outlook, email workflows, customer reports and dashboards.

Challenges

Although Patlon's previous CRM system captured all the activity under the contact level and had all the information, it was not accessible in a timely fashion. The previous CRM system also made the process for providing information on sales opportunities lengthy and tedious.

Patlon needed a CRM system that can generate reports and showcase information in a cohesive and quick manner whenever and wherever the team needs them.

Solution

WebSan created an integration of Dynamics 365 for Sales with Outlook for email tracking and communication management. Dashboards were enabled to monitor and track business performance and workflows were created to improve efficiency. Business rules and customer reports were also established to control logic and easily export information to present to stakeholders.

Patrick Mann, Director of Commercial Sales at Patlon notes that: "we looked at both Microsoft and Salesforce. To be blunt, the price pushed us to the Microsoft platform initially, but it was WebSan and their crew that solidified the sale. It was their responsiveness and their commitment to molding the system to our needs to sealed the decision. Their product got them in the door, but it was the people who solidified the sale."

Results

WebSan helped Patlon streamline their sales processes and increase efficiency. With Dynamics 365 for Sales, Patlon achieved the following results:

- Sending out reports to principals has gone from 5 hours to about 10 minutes.
- Pipeline meetings with the sales team have gone from 2 hours per person to about 30 minutes.
- The ability to dive deeper into the data and do so at a pace that does not consume all of the selling time.

Benefits

Through the use of Dynamics 365 for Sales, Patlon's sales processes have become more streamlined, enabling the sales team to be more efficient and to generate reports in a more timely manner.

Patrick Mann points out that he liked WebSan's "commitment to defining our solution with us and then executing the plan. This was done by walking with us along the entire process, countless face to face meetings, countless phone calls. They truly brought forward their half of the partnership with building this CRM. Everyone likes to feel like the money they spent after any purchase was money well spent. WebSan did nothing short of having everyone at Patlon feeling incredibly happy with the new system, this was evident with the immediate buy in from the staff."