Furniture Design Company

CRM Overhaul & Design Operations Modernization

Industry

Commercial Furniture & Interior Design

Client Size

Mid-market, multi-location

Platform

Microsoft Dynamics 365, Power Platform, Azure AD

Engagement

Discovery → Build → Train → Support

Executive Summary

A leading furniture design firm partnered with BlueSky Digital Transformation to revamp its CRM and unify sales, design, and project delivery. We implemented mobile CRM, website lead capture, automated follow-ups & escalations, and a comprehensive design operations suite.

Our solution includes time, project, and task tracking capabilities with a custom Kanban board and Design Hours Calculator. Decision-makers now rely on D365 dashboards and Power BI for a single, trusted view of pipeline, forecasts, designer utilization, and profitability across all operations.

Mobile CRM

Field sales and on-site designer access

Lead Automation

Website integration with smart routing

Design Operations

Unified project and time management

Business Challenges

Fragmented Systems

Duplicate data and slow handoffs between Sales, Designers, and Project Managers created operational inefficiencies and communication gaps.

Manual Processes

Manual follow-ups led to stalled opportunities and inconsistent client experiences across the sales cycle.

Limited Visibility

No clear view of RFP progress, win ratios, forecast accuracy, and designer capacity planning.

Mobility Constraints

No mobile access for field sales teams and on-site designers, limiting real-time updates and collaboration.

Spreadsheet Dependencies

Project and design hours tracked in spreadsheets, lacking proper approvals, auditability, or consolidated reporting.

Siloed tools meant Project Managers and Designers weren't operating in the same system as Sales—now consolidated in D365, improving data integrity and eliminating cross-tool mismatches.

Strategic Objectives

Single Source of Truth

Establish unified data for Accounts, Opportunities, RFPs, and Projects across all teams and departments.

Mobile-First Execution

Enable field sales and design teams to access and update critical information from anywhere.

Process Automation

Implement automated reminders and escalations to protect revenue and maintain service level agreements.

End-to-End Visibility

Provide comprehensive insights through D365 dashboards and Power BI reporting for informed decision-making.

Integrated Operations

Give Design and PM teams robust tools for time, project, and task management with proper governance controls.

Solution Overview

We delivered a secure, role-based D365 and Power Platform solution that streamlines the entire lead-to-delivery process with comprehensive automation and integration capabilities.

01

Lead Generation & Intake

Public website integration with secure API and Power Automate workflows. Web forms automatically create validated Leads in D365 with de-duplication logic and consent capture, plus auto-routing to correct territory representatives.

02

Sales Execution

Mobile access through D365 mobile app for on-the-go updates. Automated reminders create follow-up tasks via Power Automate, with manager escalations triggered when no movement occurs within SLA timeframes.

03

Accounts & Relationships

Comprehensive customer tracking with industry, location, revenue, and design program data. Account Strategy pages capture objectives, stakeholders, and success metrics, while Manufacturer relationships track preferred lines and agreements.

04

Opportunities & RFPs

Full opportunity lifecycle management with stage gates, revenue tracking, and probability assessments. RFP submission tracking includes approvals workflow, document management, and comprehensive pipeline analytics.

Design & Project Management Suite
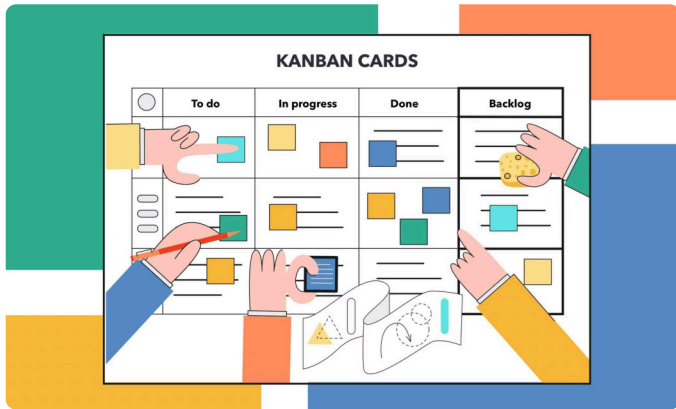
Custom Kanban Board

React/PCF Kanban embedded directly in D365 with swimlanes for each project phase from Discovery through Installation. Role-based permissions control card movement between gates, with required approvals and WIP limits to optimize workflow efficiency.

Time Tracking

Designers and PMs log billable and non-billable hours by project phase with approval workflows routed to project leads for governance and accuracy.

Project Management

Comprehensive project records including scope definition, budgeted hours, project phases, milestone tracking, and direct linking to sales opportunities.

Task Coordination

Granular task management with owner assignments, due dates, dependency mapping, and document attachments for complete project visibility.

> ⓘ **Design Hours Calculator:** Advanced estimate vs. actuals tracking with phase-level estimates that auto-roll up to project totals. Real-time variance alerts trigger manager notifications when thresholds are exceeded, with optional scope-change workflows and comprehensive burndown reporting.

Analytics & Reporting

D365 Dashboards

Day-to-day operational views providing immediate access to critical information including personal pipeline management, aging opportunities, upcoming RFP deadlines, escalation alerts, and designer task assignments.

- My Pipeline overview
- Aging opportunities alerts
- RFP submission deadlines
- Escalation notifications
- Designer task priorities

Power BI Executive Reporting

Comprehensive executive-level analytics spanning both Sales and Delivery operations with advanced visualizations and trend analysis for strategic decision-making.

- Revenue funnel and conversion analysis
- RFP cycle time optimization
- Designer utilization metrics
- Profitability by manufacturer line
- Forecast accuracy tracking

Security & Governance

Role-Based Security

Comprehensive security model with distinct roles for Sales, Design, PM, Manager, and Executive levels. Record-level access controls aligned to team structures and territorial assignments ensure data privacy and appropriate access.

Audit & Approvals

All approvals captured as immutable timeline entries with user identification, timestamps, and decision rationale. Complete audit history maintained for RFPs and all gated workflow movements.

Data Quality Controls

Stage-based required field validation, intelligent duplicate detection algorithms, and automated data integrity checks including missing next steps and over-aged task identification.
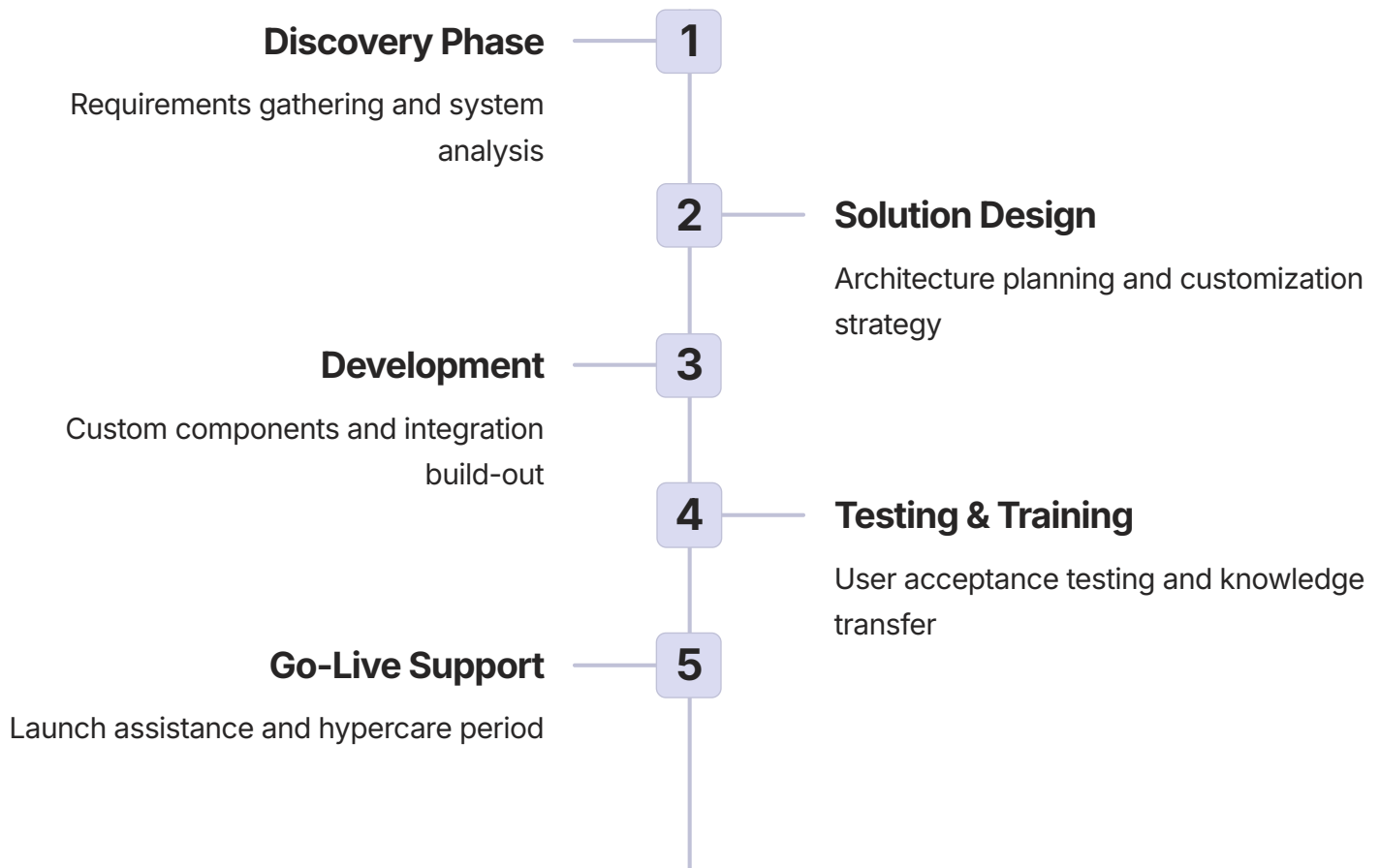
> "The security and governance framework ensures our sensitive client and project data remains protected while enabling seamless collaboration across all teams."

Adoption & Technical Excellence

Change Management Strategy

Our comprehensive adoption approach included persona-based training tailored to each user group's specific needs and workflows. We developed embedded playbooks and quick-reference guides directly within D365 for immediate access to guidance.

Post-launch hypercare support included continuous feedback collection with a prioritized enhancement backlog delivered through agile sprint cycles, ensuring ongoing system optimization and user satisfaction.

Discovery Phase
1

Requirements gathering and system analysis

2
Solution Design

Architecture planning and customization strategy

Development
3

Custom components and integration build-out

4
Testing & Training

User acceptance testing and knowledge transfer

Go-Live Support
5

Launch assistance and hypercare period

✓ **Technical Innovation:** Custom Dataverse tables, advanced Power Automate workflows, React/PCF Kanban board, team-based security architecture, and seamless website integration with intelligent lead processing.

BlueSky Digital Transformation

Growth Engine

We turn Dynamics 365 into a growth engine for sales, marketing, and delivery.

Partner with the Experts

blueskydt.com

info@blueskydt.com

Our proven methodology transforms complex business processes into streamlined, automated workflows that drive measurable results. From initial discovery through ongoing support, we deliver solutions that scale with your growth.

Ready to modernize your operations and unlock new levels of efficiency? Let's discuss how we can help transform your business processes and drive sustainable growth.

100+
Projects Delivered

95%
Client Satisfaction

Made with GAMMA