CASE STUDY

CRM DATABASE CUSTOMIZED TO TRACK CUSTOMER INFORMATION

Client Background

Our client develops data driven technologies that help farmers run efficient operations to produce more food. The company—servicing millions of acres worldwide—uses innovative digital agronomic tools to focus on the sustainable production of high-yield, high-quality crops. The solutions are designed to optimize inputs, minimize environmental impact, and protect the farm's economic viability.

Business Challenge

The client needed a customizable solution to track customer information (contracts, history, invoices, etc.). They tried standard tools, which were only partially suitable for their business and operational needs. Additionally, there were bugs that considerably decreased overall performance that threatened further business development with the client's current customers and potential business relationships.

The client wanted to be able to easily access and deal with customer information using their own integrated processes and flows.

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Project Description

The client consulted with the SoftServe team—two subcontractors (extended to 4 at later stage) and one project manager (PM)—to customize the standard solution to track customer information and automate integrations between used tools. The business requirements were formed by the project owner (PO) and the SoftServe team transformed them into technological tasks. The duration of task implementations varied depending on complexity.

The primary activity was divided into four main categories:

- Customizing the two systems with 20% refactored
- Fixing bugs
- New feature introductions—comparatively rare activity
- Automating links and integration between the two systems

The team communicated with the PO regularly mostly in writing. However, in-person meetings and phone calls were conducted as needed.

Technology Stack

MS Dynamics CRM
MS Dynamics NAV

Value Delivered

Through the collaboration, the SoftServe team was able to:

- Optimize the working frames
- Introduce account support
- Implement general system customization
- Fix bugs
- Simplify flows and minimize human input by automating integrations between used systems

As a result of the SoftServe team's work the number of technical system issues decreased from 60 per month to three to four per month. The team grouped similar problems then identified and eliminated the root cause of the problems. The client was satisfied with the team's work on the two systems.

ABOUT US

SoftServe is a digital authority that advises and provides at the cutting-edge of technology. We reveal, transform, accelerate, and optimize the way enterprises and software companies do business. With expertise across healthcare, retail, media, financial services, software, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation—from generating compelling new ideas, to developing and implementing transformational products and services.

Our work and client experience are built on a foundation of empathetic, human-focused design that ensures continuity from concept to release.

We empower enterprises and software companies to (re)identify differentiation, accelerate solution development, and vigorously compete in today's digital economy—No matter where you are in your journey.

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