

Case Study

Brunata

Microsoft Dynamics 365 Sales

About Brunata

Brunata is a Danish company with more than 100 years of experience in providing solutions that optimize the energy consumption of homes and buildings, thereby contributing to a greener world. Brunata has more than 400 employees with several offices in Denmark, and they sell products and services to 17 countries in Europe.

The project

Brunata is in the middle of a digital transformation process, focusing on using more business data to streamline and optimize their company. One of the project's paths focuses on the sales effort, which will be turbocharged by Microsoft Dynamics 365 Sales and the completely new Quotations Module.

Benefits

Microsoft Dynamics 365 Sales is a crucial step on the road towards a more efficient and optimized sales effort in Brunata's digital journey. Some of the benefits are:

- Improved management of the overall pipeline and the individual salesperson's goals.
- The implementation of the new Quotations Module for Dynamics 365 Sales provides a better opportunity to standardize the design and content of offers, management of production, and support for the solution.
- A stronger data base, which provides greater data insight in connection with forecasting, offers, and business development.

Brunata strengthens their sales efforts with the Quotations Module and Microsoft Dynamics 365 Sales

The metering company Brunata is in the middle of a digital transformation process, which is about using more business data to streamline and optimize the company. One of the project's paths focuses on the sales effort, which will be turbocharged by Microsoft Dynamics 365 Sales and the completely new Quotations Module.

Manual sales processes, limited forecasting options, and offers put together in homemade design templates. Until recently, this was the standard in Brunata, who is known for measuring, settling, and optimizing energy consumption in buildings. Over time, like so many other companies, they had become accustomed to the salespeople handling the sales activities on their own in different Excel spreadsheets. While this way of operating was working in the short-term scheme of things, it did not allow Brunata as an organization to unify workflows, build digitized flows, and generally use more data to improve overall sales efforts. Therefore, Brunata decided to invest in Microsoft Dynamics 365 Sales with AlfaPeople as their supplier.

“We ended up choosing Dynamics 365 Sales based on price and the ability to make deep integrations with Office 365. The system context in Microsoft's universe provides good synergy effects at both business and user level,” begins Klaus Sune Andersen, Sales Manager at Brunata.



Business benefits

Klaus Sune Andersen explains that Brunata is still working to extract even more value from the Sales platform, but they have a strong expectation that the collective view of the sales process will translate into a number of business benefits.

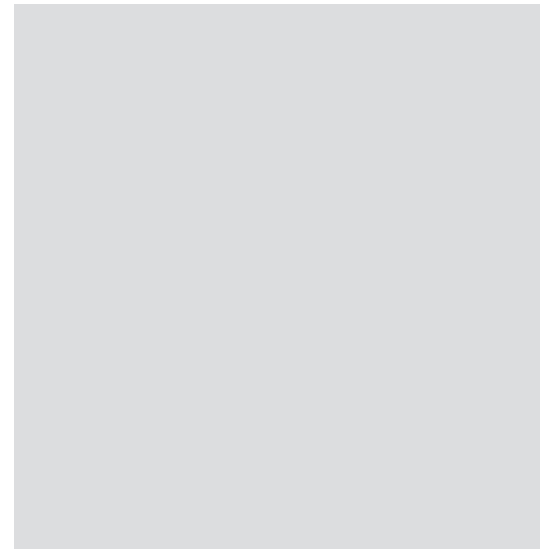
A 100 percent standard solution

Klaus Sune Andersen says that the improved forecasting possibilities are related to a completely new Quotations Module for Dynamics 365 Sales, which AlfaPeople has implemented.

“Previously, we prepared offers in our own design templates, which, firstly, did not look very professional, and secondly, could not show anything but price in the offer. We could not see the products that were included in the offer, and therefore could not work in detail with how many components were to be produced and when they were to be shipped for this purpose. We have gained access to all that intelligence with the offer module.”

Prior to the implementation of the Quotations Module, Brunata began a dialogue with AlfaPeople. In terms of insight into Microsoft's roadmap, AlfaPeople could see that Microsoft was on its way with a beta version of a brand-new Quotations Module that could be integrated directly into the Sales platform. Although AlfaPeople naturally had no experience with the module, they recommended Brunata go that route.

“It also ended up being our decision. Because everything else being equal, it is easier to maintain and support a 100 percent standardized solution,” says Klaus Sune Andersen.



Klaus Sune Andersen

Sales Manager

“Among other things, we can manage our pipeline significantly better than we could before, and thus help the individual salesman to achieve his goals. We also get a much better data base, which means that we can forecast more precisely on our offers and on the meters, we produce at our factory.”

Data helps to support the green agenda

In addition to being on a CRM journey, Brunata is also amid rapid business development, where they are going from a classic engineering company to becoming a more modern, data-driven organization.

Brunata’s core services are still within the settlement of electricity, water, and heat in multi-storey buildings, but through their sensors and meters Brunata can also provide valuable information about the indoor climate in a building, for example. In addition, their data insight can help support the green agenda. An example of this includes their use of better heat utilization and a more environmentally friendly waste disposal scheme.

The common denominator for Brunata’s data-driven business activities is that they need solid digitization tools, including CRM, if management is to be able to use data insight to make better decisions.

Coherence between economics and CRM

The next step for Brunata is to implement a new financial system and then - with the help of AlfaPeople - make integrations between CRM and the financial system to create more coherence across.

“Our vision is that at some point we can automate several of the sales processes between CRM and finance, so we do not have to spend time exchanging data between the two systems. We want to make things even smarter and utilize the resources we have to streamline and optimize our sales efforts instead of spending time on administration and manual keying. In that context, AlfaPeople is an important sparring partner for us,” concludes Klaus Sune Andersen.

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