Sales Operations

OVERVIEW

Modern sales and marketing organizations rely on capable customer relationship management (CRM) applications to help them focus their efforts, drive revenue by streamlining and automating processes, and provide insight to customer activity and competitive trends.

But CRM isn't a one-size-fits-all proposition. Oil and Gas businesses have unique needs that are not met with traditional CRM solutions.

Tailored for upstream and midstream focused companies, mcaConnect CRM for Oil & Gas Sales Operations extends the Microsoft Dynamics CRM platform to deliver industry specific capabilities that other systems can't through refined functionality and established best practices for sales pipeline analysis, revenue forecasting, visit reporting, proposal automation, goal tracking, and more. The inclusion of industry specific information such as wells, rigs, and plays enables business analytics and drilldown reporting all the way to the wellhead.

With easy access to sales opportunities and service histories for each customer, your sales professionals will always arrive at important customer meetings and site visits with the information they need. Automated workflows and standardized processes eliminate low-value tasks and help your sales professionals work smarter.

Native integration with Outlook means managing emails, appointments and contacts is fast and simple. The ability to share real-time customer information and correspondence between sales teams and across operational functions improves collaboration, efficiency and knowledge transfer – and that means better results.

xRM – which stands for applications built via the native ability to extend Microsoft Dynamics CRM – provides a powerful, flexible, low-cost, rapid development platform. Built on Microsoft .NET, .xRM delivers sophisticated data modelling, ultra-modern UX creation, diverse accessibility options, security modelling, workflows, reporting and more – that make it simple and easy to create robust, vertically specific, line of business applications that would otherwise require thousands of hours of custom development.

Of course, if custom development is still required, Dynamics CRM can always be extended further with .NET to deliver unlimited capabilities.

MCACONNECT XRM SOLUTIONS FOR OIL & GAS

Built on the Microsoft Dynamics XRM platform, mcaConnect xRM solutions for Oil & Gas are easily accessible through numerous interfaces including Web browsers, mobile apps, and Microsoft Outlook.

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CAPABILITIES

Give your sales professionals usability features, processes, data access and dashboards specifically designed to help them maximize productivity and effectiveness:

• Next generation account, contact and activity management
• Account organization charts, hierarchy and sales segments
• Oilfield industry data integration
• Well and rig mapping and lead creation
• Opportunities, integrated projects and risk analysis
• Quote and proposal generation
• Packaged integration to ERP systems
• Multi-period revenue and resource forecasting
• Market potential and share analysis
• Goal and budget management and reporting
• Advanced sales pipeline analytics and KPIs
• Equipment and rig calendaring, utilization tracking and availability forecasting
• Customer installation tracking
• Competitor tracking and analysis
• SharePoint document management integration
• Dashboard Reporting and Business Intelligence
• Simple and familiar user interfaces including accessibility through Outlook and mobile devices

BENEFITS

Boost the efficiency and effectiveness of your sales teams and drive revenue for your company:

• Enforce your sales methodology and apply consistent sales procedures with visual process flows and versatile business logic.
• Leverage automated quote generation to enhance sales productivity, improve proposal turnaround time, and increase quote accuracy and consistency.
• Enhance sales operations management by tracking progress against sales targets and using leading indicators to identify problem areas before it’s too late to do anything about it.
• Improve and expedite forecast generation and accuracy with advanced forecasting tools that accommodate complex revenue and resource spreads – and are also simple to use.
• Target and win more business by identifying early stage leads based on marketplace data triggers such as well permits and rig moves.
• Easily track and manage all types of communications activities including email, tasks, appointments, phone calls, faxes and letters.
• Simplify administrative workloads and improve report accuracy by converging revenue forecasting and market share assessment into a single point of entry.
• Increase win rates by more effectively collaborating on integrated sales projects and surfacing cross selling opportunities.

ABOUT mcaConnect

mcaConnect specializes in delivering business solutions to Oil & Gas organizations that connect and streamline operations across the enterprise, improve customer and stakeholder relations, and drive profitability. Our Oil & Gas industry solutions are specifically designed to improve the effectiveness and efficiency of sales, marketing, accounting, and service operations for Oil & Gas Service Providers, Operators, Midstream businesses, Equipment Manufacturers and Distributors.

Built on the Microsoft Dynamics platform, these solutions deliver rich, modern functionality that is easily tailored to your business’s unique operations.

Beyond the technology, our solution consultants are industry and process experts and work closely with customers to achieve truly transformative business results. Discover how we help leading companies in these oil and gas industry segments realize innovation and drive new levels of performance.

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