

Transforming CRM Data to Business Intelligence: Sun Valley Solar Solutions Partners with Dyn365Pros

Sun Valley Solar Solutions helps Arizona’s home and business owners turn the state’s most abundant natural resource—sunlight—into immediate cost savings and a cleaner world. The Chandler, AZ company has earned top rankings and won numerous customer service awards.

Challenge: Enhanced CRM reporting capabilities

With any CRM, an organization is going to have challenges with respect to managing and visualizing data. The primary challenge is maintaining data quality, and the other challenge is developing the ability to see and use data in a way that benefits users and decision makers. Measuring critical metrics such as wins, losses, retention, and attrition is only possible if the CRM organizes and presents the data in a way that makes sense. If the CRM can’t do that, its value is limited.

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Corporate Infrastructure Architect
Sun Valley Solar Solutions

Approach: Microsoft Power BI and an inside job

In a data-driven organization, data roadblocks become apparent quickly. Sun Valley Solar’s team knew where the roadblocks were and what they needed from a BI and dashboard solution.

Sun Valley Solar needed to:

- Make better use of their existing data
- Present data, patterns, and predictions to stakeholders in a way that made working with them easier
- Reduce the hours required to create and share reports
- Automate reporting whenever possible

CASE STUDY: SUN VALLEY SOLAR SOLUTIONS



Sun Valley Solar chose Dyn365Pros to configure Dynamics 365 to better support their Customer Service, Sales, and Field Service processes. The decision to deploy Power BI was driven by limitations encountered with standard dashboards. Dynamics 365 dashboards offered too few chart options and required export to Excel to perform certain calculations and analyses. Daniel asserts that Power BI allowed much more versatile dashboards and reporting, as well as powerful capabilities for calculations and formulas. Expanded options were even more critical because the company pulls in data from other sources, such as SharePoint and Excel. "In Power BI, you can slice and dice the data any way you want," reveals Daniel.

After Dyn365Pros helped Sun Valley Solar build their CRM, Daniel and his team created custom Power BI dashboards, connecting directly to all the company's data. For example, Sun Valley Solar replaced their existing survey solution with Dynamics 365 Voice of the Customer and pushed that data to Power BI where it could be shared and analyzed by workers and decision makers. This move alone took the company's data reporting to a new level.

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Results: What previously took weeks now takes a day

For Sun Valley Solar, the primary advantage of Power BI is the ease of reporting and data analysis. "The reporting in itself is a big win," contends Daniel, and the Voice of the Customer survey data is a perfect example. "Before, we had to manually download survey results, throw it into Excel, and have somebody come up with a report based on a Frankenstein way of calculating the numbers." The company's Power BI dashboards now automate reporting, freeing up staff time to focus on other tasks. Previous survey data was only visible to the marketing department—Power BI data is visible to the entire team.

Considering that reports that used to take weeks to prepare can now be completed in less than a day, the effect of this improvement on the company's bottom line cannot be overstated. Power BI helps Sun Valley Solar automate report-related tasks that were labor intensive and burdensome for management and departmental leaders:

- Streamlining the budget process
- Tracking sales goals and system installations
- Avoiding project delays
- Identifying potential process trouble spots and reinforcing best practices

Bottom line, their CRM data is now easier to interpret and more visually appealing. As partners, Dyn365Pros helped Sun Valley Solar elevate its Dynamics 365 system and move a critical data project to successful completion. Sun Valley Solar relied on Dyn365Pros and a Power BI data solution to build a CRM that fills knowledge gaps and drives both sales and service excellence.