

# CRM That Grows With You

Enhancing CRM with Microsoft Power Platform

A global technology firm partnered with Krish to modernize its customer relationship management using CRM Lite. By centralizing customer data, automating lead workflows, and enhancing reporting with Power Platform, the firm saw major efficiency gains, reduced costs, and stronger customer engagement.

## CLIENT BACKGROUND

A leading global tech enterprise operating across multiple continents, the client offers a wide portfolio of products and services. Their sales and customer service operations were hindered by fragmented systems, inconsistent lead tracking, and lack of real-time customer insights, prompting the need for a scalable CRM upgrade.

## BUSINESS VALUE

- **35% Efficiency Gain:** Automation reduced time spent on admin tasks, freeing reps to focus on selling.
- **25% Cost Reduction:** Streamlined workflows and data accuracy led to measurable savings in operations.
- **Deeper Customer Insights:** Targeted campaigns and faster service responses improved satisfaction and loyalty.
- **Scalable Foundation:** CRM Lite now supports growth across geographies and future integrations with ERP.

## PROBLEMS

- **Decentralized Customer Data:** Client information was scattered across multiple tools, limiting visibility and slowing response times.
- **Manual Lead Management:** Sales teams relied on spreadsheets and emails, causing delays and lost opportunities.
- **No Analytics or Forecasting:** Leadership lacked real-time dashboards to track pipeline or campaign performance.

## SOLUTIONS

- **CRM Lite Deployment:** Delivered a lightweight yet robust CRM using Power Apps, centralizing all sales and customer data.
- **Workflow Automation:** Power Automate was used to streamline lead assignment, follow-ups, and approval flows.
- **Sales Intelligence Dashboards:** Power BI dashboards gave leaders actionable insights into conversion rates, pipeline trends, and customer behavior.

## TECHNOLOGIES



## NEXT STEPS

By implementing CRM Lite on Microsoft Power Platform, the client transformed its CRM from fragmented and reactive to unified and insight-driven. The solution now supports faster sales cycles, better decisions, and global scalability, without the cost and complexity of a full-blown enterprise CRM.