



# Large Upgrade of Sales Management Platform for Zeppelin based on Dynamics 365

Implementing a complex business solution for a large supplier of construction equipment

Industry: Manufacturing & Construction

Location: Switzerland

Employees: 1,800+



## Client Background

The Zeppelin Group operates in 190 branches worldwide with more than 10 000 employees and sales of EUR 3.1 billion in the 2019 fiscal year, the highest number in its 70-year history.

Zeppelin supplies legendary Caterpillar equipment. A wide range of products offered by the company helps customers to solve tasks of any complexity — from excavation to power of the constructed object and marine equipment. Together with Cat® equipment, used in construction, mining, oil, and gas industries, Zeppelin offers a wide range of marine, industrial diesel, and natural gas engines, Cat, MAK™, and EMD systems.

Zeppelin provides professional service at a high level in the shortest possible time and is improving their quality in a continuous process. Genuine spare parts top service fill their warehouse network throughout the country allowing them to provide an uninterrupted supply.

Website: [www.zeppelin.com](http://www.zeppelin.com)

## Business Challenge

Zeppelin CE Eurasia supplies construction equipment for seven countries (Armenia, Belarus, Russia, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan). The company utilizes a business solution based on the security and functional capabilities of Dynamics CRM 2011.

As the Company's strategy aims at developing long-term partnerships with their customers, using the latest technologies to offer the best service is of the utmost importance, and **the following goals and challenges had to be solved:**

- The sales team required a modern tool for customer relationship management, available anytime-anywhere on their phones and tablets.
- The group of sales/purchase processes are dynamic and require the kind of flexibility that legacy platform was not able to provide anymore. Transparency and maintenance ease of all processes were of great importance as well.



## Business Challenge

- Common patterns for organizational role management and automated provisioning were out-of-date and demanded optimization and versatility. Overall system performance was degrading due to the growing size of databases and poor scalability of the legacy platform.
- Our client needed a modern solution for product catalog management, customer segmentation tools, customer voice, etc.

Zeppelin was looking for a reliable service supplier with top-level expertise, capable of implementing a complex update to sales management business solution. Among other service providers, Zeppelin selected Infopulse as a core implementation partner for this complex and long-term project.

## Solution

Zeppelin and Infopulse have been working closely as a united team on the solution implementation project since January 2018. Since then, Infopulse has helped Zeppelin implement a **cutting-edge business solution based on the Dynamics 365 platform** by conducting a comprehensive reengineering of legacy system functionalities.

**The project was carried out in a number of stages,** based on users' priorities and their feedback:

- Built the solution for managing organizational structure and maintenance of flexible privileges provisioning, including delegation and escalation processes.
- Moved all calculations and complex decision-making matrixes to the business rule management system for increased change flexibility.
- Developed requirements and conducted re-engineering for sales and purchases groups of processes, including lead qualification, opportunities processing, quote approval, client

collaboration and merge, activities management, fleet management, reports, and dashboard building, etc.

- Conducted a five-day workshop for business users and knowledge transfer for technical specialists.
- Implemented printed forms for sales representatives and sales administrators.
- Enhanced the notification system for end-users.
- Migrated data from Dynamics CRM 2011 to Dynamics 365.

# Technologies

A customer relation management business solution:



Microsoft Dynamics 365 Customer Engagement, version 9

A low-code business rules management system:

inrule

InRule BRMS

A connector application for quick integration with CRM and ERP systems:



TIBCO Scribe Insight

Programming Languages:



C#















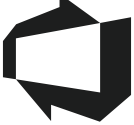
Typescript




PowerShell

# Technologies

## Developer frameworks, technologies and core libraries:

 .NET Framework	 .NET Dynamics 365 SDK	 .NET Dynamics 365 XRM tooling	 InRule SDK
 WCF	 .NET Core	 Angular	 Newton.Json
 spkl	 Webpack	 DocFx	 Type2DocFx
 Azure DevOps Web API			

## Test frameworks, technologies and core libraries:

 MS Test	 Unity	 NUnit	 FakeItEasy
 spkl.fakes	 Jasmine	 Karma	 XrmMock

## Business Value

Implementing a new sales management solution based on a modern, future-proof Microsoft Dynamics 365 platform helped Zeppelin CE Eurasia to leverage customer engagement, improve internal workflow, and make relevant processes more transparent and convenient for all system end-users — from customer support to sales managers, field experts, and Zeppelin executives. Implementing Microsoft Dynamics 365 resulted in:

- Improved planning, customer relations management, deal management, and deal tracking processes.
- Migration to a modern on-premises-based Microsoft Dynamics 365 platform with unified interface and mobile Dynamics 365 application.
- Universal on-the-go access via handheld devices vastly improved decision-making processes for field sales managers and executives.

- Intuitive UX/UI flow and much better integration with other Microsoft business solutions (e.g., Outlook).
- Adoption of new security capabilities of the modern Dynamics 365 platform.
- Accelerated execution of business requests, assignment/role management, and introduction of changes to security roles.
- Faster time-to-market and better QA for new requirements with better tracking of development stages. New business rules can be implemented as fast as in a matter of 2 days instead of 2–3 weeks.

- Improved system performance, availability, and scalability.
- Post-implementation technical support and maintenance with continuous feedback and improvement.

With the first release affecting two branches in the CIS region, the second release included country-specific customizations for the Dynamics 365 platform for the branch offices of Zeppelin CE Eurasia in the remaining six five countries. Now that Zeppelin and Infopulse rolled out a stable, refined version of the solution across regions, Infopulse is currently working with Zeppelin on the new scope of functions for the next stage of the project.

# Customer Quote



When researching the market of Microsoft Dynamics implementation vendors, Infopulse was one of the few companies able to deal with a project of such complexity and scale. In the span of two years that Zeppelin CE Eurasia and Infopulse have been working together on this project, the Infopulse team has proven to be very productive, experienced, and tight-knit. They constantly demonstrated their expertise by being able to fully understand and fulfill our requirements and by being attentive to even the smallest requests and aspects

of this complex project. Infopulse is not afraid to take the highest levels of responsibility, as they always strive to find and offer new approaches or better ways to implement a specific feature. Their help was invaluable when we reviewed and redesigned CRM workflows and processes. As we already enjoy the new functionalities powered by Dynamics 365, we can confirm that cooperation with Infopulse on our Sales Management Solution turned out to be extremely productive.



**Tatiana Rozumna**  
Zeppelin Head of MSD Applications Group





## About Infopulse

Infopulse, part of the leading Nordic digital services company Tietoevry, is an international vendor of services in the areas of Software R&D, Application Management, Cloud & IT Operations, and Cybersecurity to SMEs and Fortune 100 companies across the globe. Founded in 1991, the company has a team of over 2,300 professionals and is represented in 7 countries across Europe and the Americas.

Infopulse is trusted by many established brands, such as BICS, Bosch, British American Tobacco, Credit Agricole, Delta Wilmar, ING Bank, Microsoft, Offshore Norge, OLX Group, OTP Bank, SAP, UkrSibbank BNP Paribas Group, Vodafone, Zeppelin Group, and others.

For more information, please visit **[www.infopulse.com](http://www.infopulse.com)**

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