

WHITEPAPER



## Dattico CRM Solution for Niche Device

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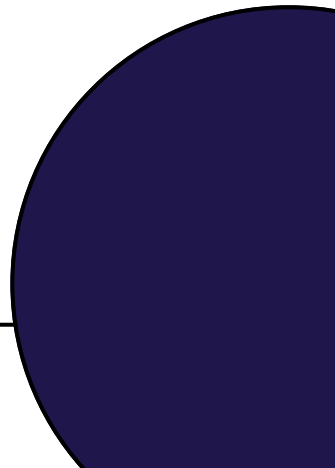
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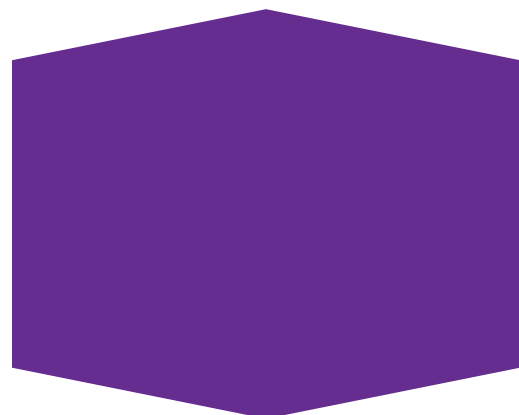
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Dattico recently developed and deployed a tailored Customer Relationship Management (CRM) solution for a client in the niche market of device sales in Canada. This client operates in a highly competitive environment, similar to the high-energy sales floors of Wall Street, where distinct roles of sales openers and closers are crucial for operational efficiency. After an extensive search, the client could not find any existing CRM solutions that met their specific needs. Recognizing this gap, Dattico designed and implemented a custom CRM specifically for this client, addressing their unique sales process requirements. The success of this implementation has sparked interest from other companies in the same niche, leading Dattico to explore a partnership with the client to transform this solution into a SaaS (Software as a Service) offering for the broader market.

Dattico's collaboration with the client to resell the CRM solution as a SaaS product aims to extend the benefits of this specialized tool to other businesses within the niche device sales market. This partnership can help similar companies manage their sales processes, providing a tailored, efficient, and scalable solution.



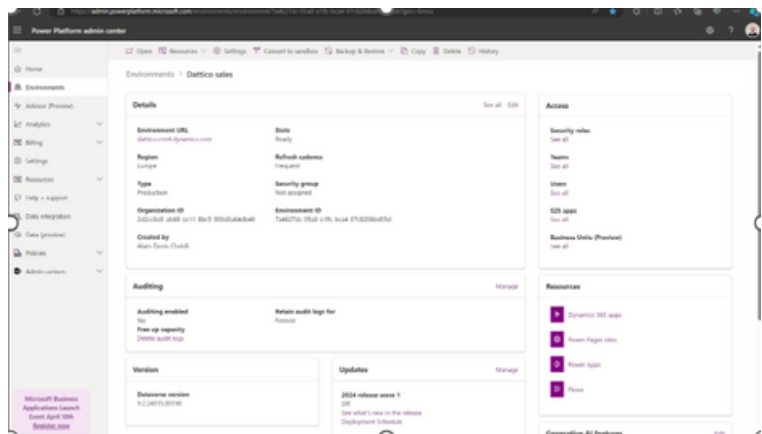
# STATEMENT

The client, a prominent player in the Canadian market for specialized device sales, operates in a fast-paced sales environment where the roles of openers and closers are distinctly defined. Openers focus on generating and qualifying leads, while closers concentrate on converting these leads into sales. This dynamic, akin to the high-pressure sales floors of Wall Street, necessitates a CRM system capable of supporting rapid communication, seamless lead handovers, and real-time sales activity tracking.

Despite an extensive search, the client could not find a CRM solution that adequately supported their unique sales dynamics. Existing CRMs lacked the necessary functionality to manage the workflow between openers and closers effectively, particularly in terms of efficiently transferring leads and tracking performance metrics. Moreover, the client required a solution that could integrate seamlessly with their existing phone system, handle high volumes of data, and provide detailed analytics to optimize their sales strategies. The critical issues faced by the client with existing CRM solutions were:

1. **Lack of Role-Specific Functionality:** Most CRMs offered generic features that did not cater specifically to the distinct tasks of openers and closers, leading to operational inefficiencies.
2. **Poor Lead Transfer Capabilities:** Seamless lead handover from openers to closers was a significant challenge, as existing CRMs did not offer robust workflows for effective lead management throughout the sales funnel.
3. **Inadequate Real-Time Analytics:** The client's fast-paced sales environment required real-time data and insights, which off-the-shelf CRMs could not provide, hindering quick decision-making.
4. **Integration Challenges:** The client's existing phone system was integral to their sales process, but most CRM solutions either lacked integration capabilities or required extensive customization, leading to increased costs and longer implementation times.

# DATTICO'S SOLUTION



Dattico approached the project with a deep understanding of the client’s operational needs. The objective was to create a CRM solution that not only addressed the immediate challenges but also enhanced overall sales efficiency.

1. **Custom Role Management:** Dattico developed a CRM with advanced role management features, allowing the system to distinctly separate the tasks of openers and closers while facilitating seamless collaboration. The interface was tailored to each role, optimizing tools for lead generation, qualification, and closing.
2. **Optimized Lead Transfer Workflow:** The CRM included a sophisticated lead transfer mechanism, ensuring that leads could be passed from openers to closers without losing momentum. Automated notifications and reminders were integrated to enhance the efficiency of the sales process.
3. **Real-Time Analytics and Reporting:** Dattico integrated advanced analytics and reporting features into the CRM, allowing sales managers to track performance in real-time. This enabled quick adjustments to strategies and improved overall sales outcomes, with customizable dashboards displaying key performance indicators (KPIs).
4. **Phone System Integration:** Recognizing the importance of the client’s existing phone system, Dattico ensured that the CRM seamlessly connected with it. This integration supported the high-volume, rapid communication required in the client’s sales environment.
5. **Scalability and Flexibility:** The CRM was built on AWS Amplify, with DynamoDB for database management and React for the front-end. This architecture provided scalability, allowing the client to grow their system as their business expanded. DynamoDB, in particular, reduced operational costs significantly due to its efficient data handling.

# MARKET IMPACT

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The success of the CRM implementation quickly gained attention within the niche market. Other companies facing similar challenges with existing CRM systems expressed interest in adopting Dattico's solution. The CRM's ability to manage complex sales processes and its adaptability made it a highly attractive option for businesses looking to optimize their sales operations.

In light of this interest, Dattico is now in the process of partnering with the client to transform this custom CRM solution into a SaaS offering. This collaboration will enable other businesses in the niche device sales market to access a tailored CRM that addresses their specific needs. The SaaS model will provide these companies with an efficient, scalable solution that can be easily integrated into their existing operations, driving greater market competitiveness.

Dattico's custom CRM solution, initially developed for a niche device sales company in Canada, demonstrates how specialized technology can effectively address specific business needs. By focusing on the unique dynamics of the client's sales floor, Dattico delivered a CRM that not only met but exceeded the client's expectations, significantly improving their sales efficiency.

The success of this solution has led to a partnership with the client to resell the CRM as a SaaS product, extending its benefits to other companies within the same niche market. This SaaS offering will provide a powerful, scalable solution tailored to the specific requirements of businesses operating in similar high-pressure sales environments. Additionally, Dattico plans to further enhance the CRM by developing an integrated phone solution, creating an even more cohesive and comprehensive sales tool. The technical foundation of the CRM, built on AWS Amplify, DynamoDB, and React, ensures that it remains cost-effective, scalable, and adaptable, positioning Dattico and its clients for continued success in the competitive niche device sales market.

# Conclusion.



Viktor is a dynamic Data Scientist and Engineer whose comprehensive skill set, educational background, and professional experience make him a standout candidate in the field of data science.

*Viktor Melnikov*



Focused on resolving new problems, he has a strong data science and data engineering skillset and a large knowledge pool about diverse subjects. He is also a data enthusiast and knows about the whole process from collection to end consumption.

*Nathan DeWinter*



Senior Project Manager focused on delivering platforms for Artificial and Business Intelligence with a track record on helping companies become data driven. Experienced in building cloud solutions both in Azure and AWS. With 16 years in data and 27 years in IT, he is ready to understand all aspects of the solution and communicate complex issues to stakeholders.

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