CASE STUDY

Transforming Sales Operations for a Leading Australian Linen & Garment Services Provider

About the Client

The client is a leading Australian provider of commercial linen and garment services, supplying motel, healthcare, and garment customers nationally. The business runs a complex weekly delivery and pricing cycle across multiple depot locations and direct supply channels, with pricing that varies by customer type, product mix, and delivery route.

The Challenge

The sales function had grown faster than the systems supporting it. Quoting, costing, and pipeline management were all handled outside any central platform, which created risk at exactly the point where margin is won or lost.

- **Spreadsheet-based quoting:** The sales team built every quote manually in spreadsheets, making the process slow, error-prone, and impossible to standardise across reps.
- **Manual freight costing:** Freight and delivery costs were calculated from individual knowledge or outdated spreadsheets, causing inconsistencies and delays in finalising proposals and weekly margin reviews.
- **Fragmented data systems:** Operational and reporting data sat across separate legacy platforms with no central CRM, limiting cross-departmental visibility and creating material data-quality risk.
- **No pipeline visibility:** Management had no real-time view of active leads, follow-up status, or sales performance, making accurate revenue forecasting impossible.
- **Slow quote turnaround:** Quote preparation took several days, limiting the business's ability to respond to prospects and compete on speed.
- **Legacy system dependency:** Product, pricing, and operational data lived in legacy systems, so the new platform required careful integration planning and a structured data migration.

The Solution

CloudFronts delivered Microsoft Dynamics 365 Sales with a fully customised Configure, Price, Quote (CPQ) engine built to automate quoting and weekly margin calculation — the two processes with the greatest direct impact on deal speed and profitability.

- **Dynamics 365 Sales process setup:** Configured Leads, Opportunities, Quotes, and Orders with industry-specific fields including customer type, supply details, estimated weekly volume, and factory and depot assignments. A four-stage Business Process Flow (Lead → Opportunity → Quote → Order) standardised the sales cycle across the team.

- **Custom CPQ engine:** A purpose-built quoting engine that auto-calculates weekly margin across production, packaging, delivery, and freight rates per kilogram. A manager approval workflow enforces financial governance without slowing the sales team.
- **Adobe Sign integration:** Digital contract signing triggered directly from the Dynamics 365 quote record, removing physical paperwork from the close and shortening the time between agreement and signature.
- **Product catalogue management:** All product master data centralised in Dynamics 365, organised by customer type with associated pricing, product codes, and cost structures surfaced directly on the quoting screen.
- **SharePoint Online integration:** Document management connected to Dynamics 365 Sales records, with Outlook email tracking enabled for all sales users.
- **Data migration:** Existing accounts, contacts, and open opportunities migrated from legacy systems into Dynamics 365 using CloudFronts-supplied templates, loaded into both UAT and production environments.

Reporting & Analytics

To give management and sales teams visibility into core sales operations, CloudFronts delivered a combination of native Dynamics and custom reporting connected to live Dynamics 365 Sales data:

- **Lead follow-up and overdue tracking:** Every active lead with last interaction date, notes, task due dates, and owner — so sales managers can spot overdue follow-ups immediately.
- **Sales performance tracking:** A master report for management covering commissions, invoice amounts, and cost detail across all reps, plus an individual report giving each rep visibility into their own earnings and deal progress.
- **Forecast revenue:** Pipeline view with estimated close dates, probability, gross margin percentage, and estimated revenue by solution, giving leadership a forward-looking view of expected bookings.
- **Pipeline health dashboard:** Opportunities won, lost, cancelled, and reactivated with total contract values segmented by stage, department, country, and region.

Key Technologies

- **Microsoft Dynamics 365 Sales:** System of record for the entire sales cycle, from lead capture through to signed contract.
- **Custom CPQ:** A bespoke quoting engine inside Dynamics 365 handling weekly margin calculation, depot cost lookups, freight rate checks, and manager approval workflows.
- **Adobe Sign:** Integrated with Dynamics 365 quotes for electronic contract execution.
- **SharePoint Online:** Centralised document storage and collaboration linked to Dynamics 365 Sales records.

- **Dynamics 365 App for Outlook:** Email tracking and logging directly from Outlook into Dynamics 365 records.
- **Dynamics and custom reporting:** Lead tracking, sales performance, forecast revenue, and pipeline health analytics.

Results & Impact

- **Quote turnaround reduced from days to under an hour:** The automated CPQ engine replaced multi-day spreadsheet quoting, letting the sales team produce accurate, margin-validated quotes in minutes directly from Dynamics 365.
- **Real-time pipeline and sales visibility:** Management gained a consolidated view of every lead, opportunity, and quote in one platform, supported by reporting on team performance and forecast revenue.
- **A standardised sales process:** Every team member now follows the same four-stage Business Process Flow in Dynamics 365, eliminating the ad hoc approaches that previously caused inconsistency across the team.
- **Stronger financial governance:** The manager approval workflow ensures no quote falling below the agreed margin threshold reaches a customer without review, protecting profitability on every deal.
- **Faster contract execution:** Adobe Sign integration removed paper-based bottlenecks from contract signing and accelerated deal closure.
- **Consolidated customer data:** Accounts, contacts, and open opportunities migrated from fragmented legacy systems into a single accessible source of truth, improving data quality and cross-team collaboration.

Conclusion

Dynamics 365 Sales went live in 2026 as the client's core CRM platform, with a custom CPQ capability, Adobe Sign contract execution, SharePoint document management, Outlook email tracking, migrated customer data, and a full reporting layer delivered as part of the same programme.

The client has moved its sales operation from fragmented, manual processes to a single structured Dynamics 365 platform, with quoting, margin control, contract execution, and sales reporting all running in one place.

Looking Ahead

With Dynamics 365 Sales established as the core CRM platform, the client has a foundation to extend the same connected approach across the wider business.

- **ERP integration with Dynamics 365 Business Central:** Connecting finance and operations to the sales platform to create a single flow from quote through to order, invoice, and financial reporting.
- **Dynamics 365 Customer Service:** Adding case management and service tracking alongside the existing sales process, giving a single view of the customer across both sales and post-sales support.

- **Continuous improvement:** Ongoing managed support to refine the CPQ engine, extend reporting, and roll out enhancements as the business evolves.

Facing the same quoting and margin visibility challenges? Talk to CloudFronts about what Dynamics 365 Sales and a purpose-built CPQ could do for your sales cycle.

Contact us at **transform@cloudfronts.com**