



The Challenge: Legacy Tools, Dispersed Documents

Reliance on Macro-Enabled Spreadsheets:

Estimators managed bids using complex Excel workbooks with macros, a deprecated, high-risk toolset that could be retired by Microsoft in the future. This made the bid process cumbersome and introduced potential continuity risks.

Decentralized Bid Tracking:

Bids and won jobs were tracked in isolated Excel files on a local server, with no single source of truth. Data had to be manually transferred (e.g. sending won bids to Accounting for invoicing), resulting in duplicate entry, version control issues, and delayed handoffs. Collaboration was difficult, and remote access to bid information required VPN, slowing responsiveness.

Lack of Forecasting & Visibility:

Without a proper CRM, the client had no real-time view of its sales pipeline or future revenue. The team could not easily analyze win rates or forecast upcoming jobs, hindering strategic decision-making and growth planning.



CASE STUDY

Automating bidding and project management tools and processes.

CLIENT

An Architectural
Finishing Company

PARTNER

Beringer Technology Group
(Microsoft Solutions Partner)

THE SOLUTION

Automation of document management into a unified, cloud environment.

Solution

Beringer Technology Group implemented a phased **Microsoft Dynamics 365 Sales** solution to transition the client from legacy spreadsheets to a unified cloud environment.

- **Phase 1 (Bids):** Centralized all bid tracking into a custom "Bid Board" dashboard. **Business Process Flows** were introduced to standardize the bidding lifecycle.
- **Phase 2 (Jobs):** Automated the handoff from Sales to Operations. When a bid is marked "Won," the system automatically generates a **Job record** with a unique ID and a predefined kickoff task list.
- **Document Integration:** Replaced the shared network drive with native **SharePoint integration**, allowing estimators to collaborate on templates directly from the CRM while maintaining familiar Excel-based estimating processes.

Technical Details

Dynamics 365 & Power Automate:

Deployed custom tables for Bids and Jobs. **Power Automate** was utilized to automatically migrate SharePoint folders from a Bid to a Job upon closing, ensuring seamless data continuity.

Security & Accessibility:

Implemented a granular security model (Sales vs. Team Member roles) and retired legacy file servers in favor of cloud-accessible, version-controlled SharePoint libraries.

Hybrid Migration:

To minimize disruption, existing macro-enabled sheets were integrated as templates, with a roadmap to refactor them into native Dynamics functionality in future phases.

Benefits

Efficiency & Automation:

Instantaneous job creation from won bids saves project managers hours of manual data entry per project.

Pipeline Visibility:

Centralized data provides real-time tracking of win/loss ratios and estimator workloads, enabling accurate sales forecasting.

Process Consistency:

Guided workflows ensure every project follows a proven kickoff sequence, reducing errors and omissions.

Cloud Collaboration:

24/7 VPN-free access allows teams to collaborate on proposals and project plans from the office or job sites in real time.

Future-Readiness:

The scalable D365 platform provides a foundation for upcoming AI-driven reporting and the complete retirement of legacy Excel dependencies.

