

ORBIS CONSTRUCTIONONE

Dynamics 365 for Customer Engagement

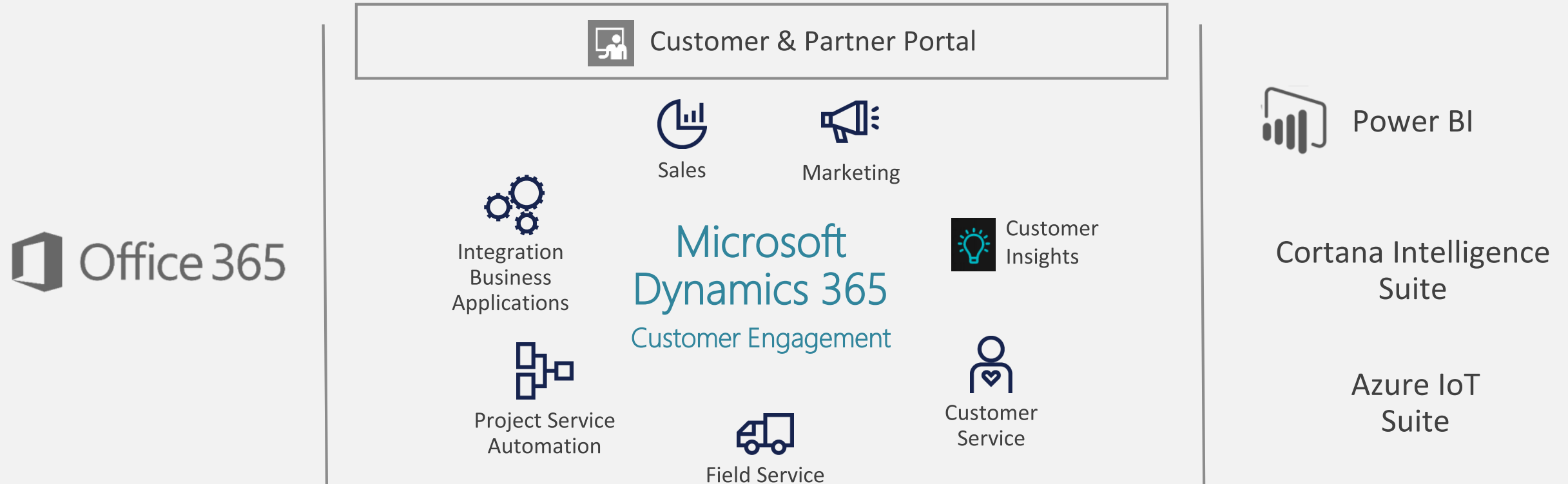
THE MICROSOFT DYNAMICS 365 PLATFORM



THE CUSTOMER SUCCESS PLATFORM: DYNAMICS 365 CRM

Intelligent business applications in the cloud

Microsoft AppSource



Common application platform: PowerApps, Microsoft Flow, Common Data Model

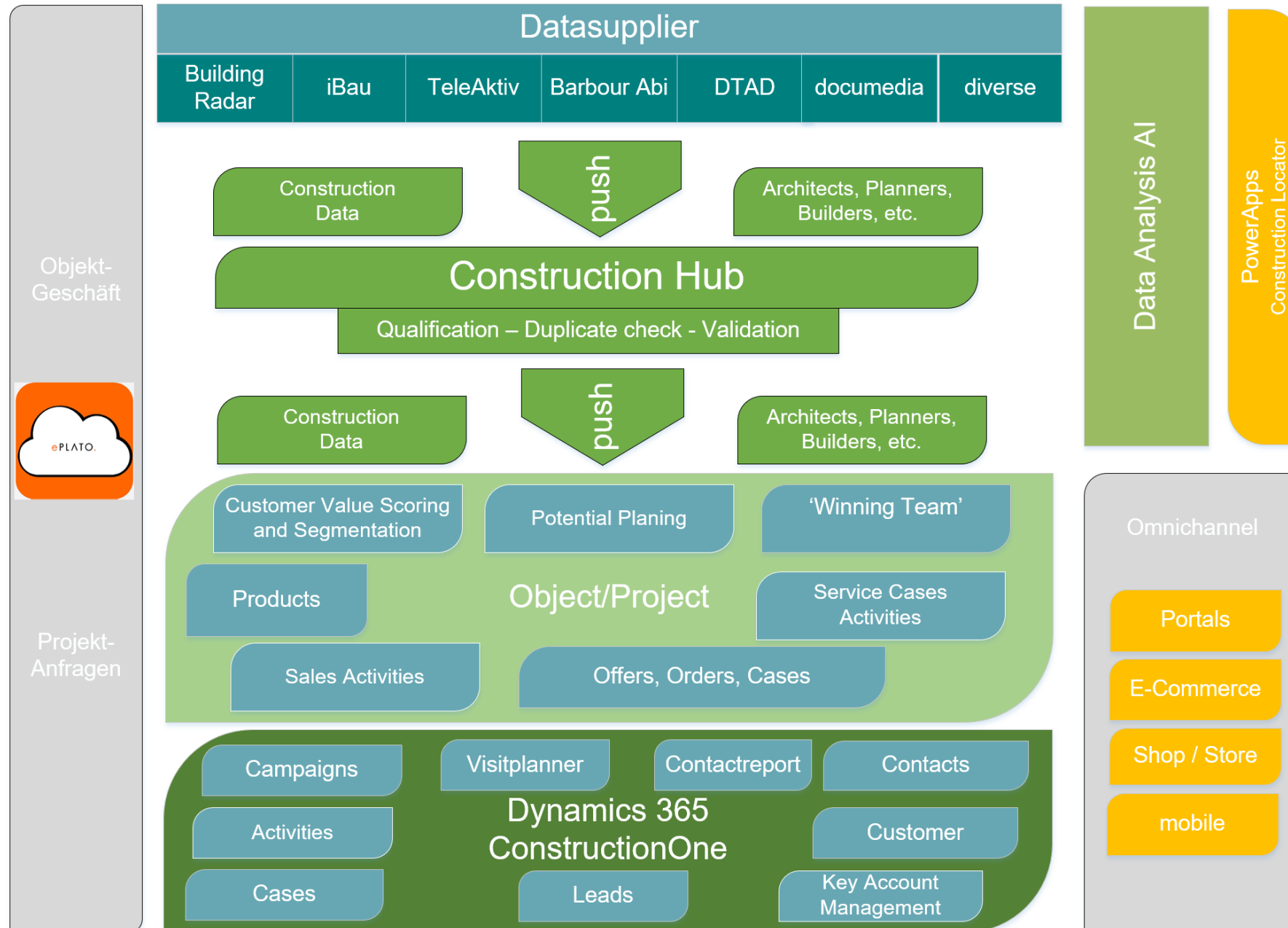
AZURE

ORBIS CONSTRUCTIONONE

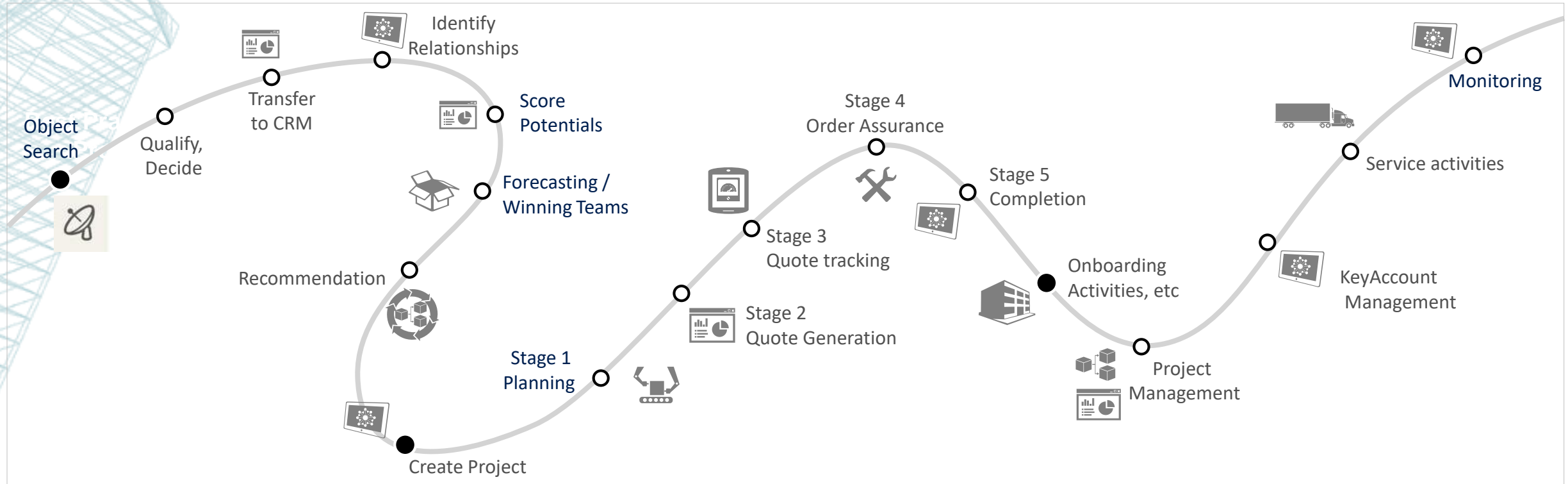
Dynamics 365 for Customer Engagement

OVERVIEW OF ORBIS CONSTRUCTIONONE





ORBIS CONSTRUCTIONONE JOURNEY MAP



Digital Hotspots

Construction Hub

- Qualify Objects
- Manage Relations
- Plan Potentials
- Recommendation

Object Qualification

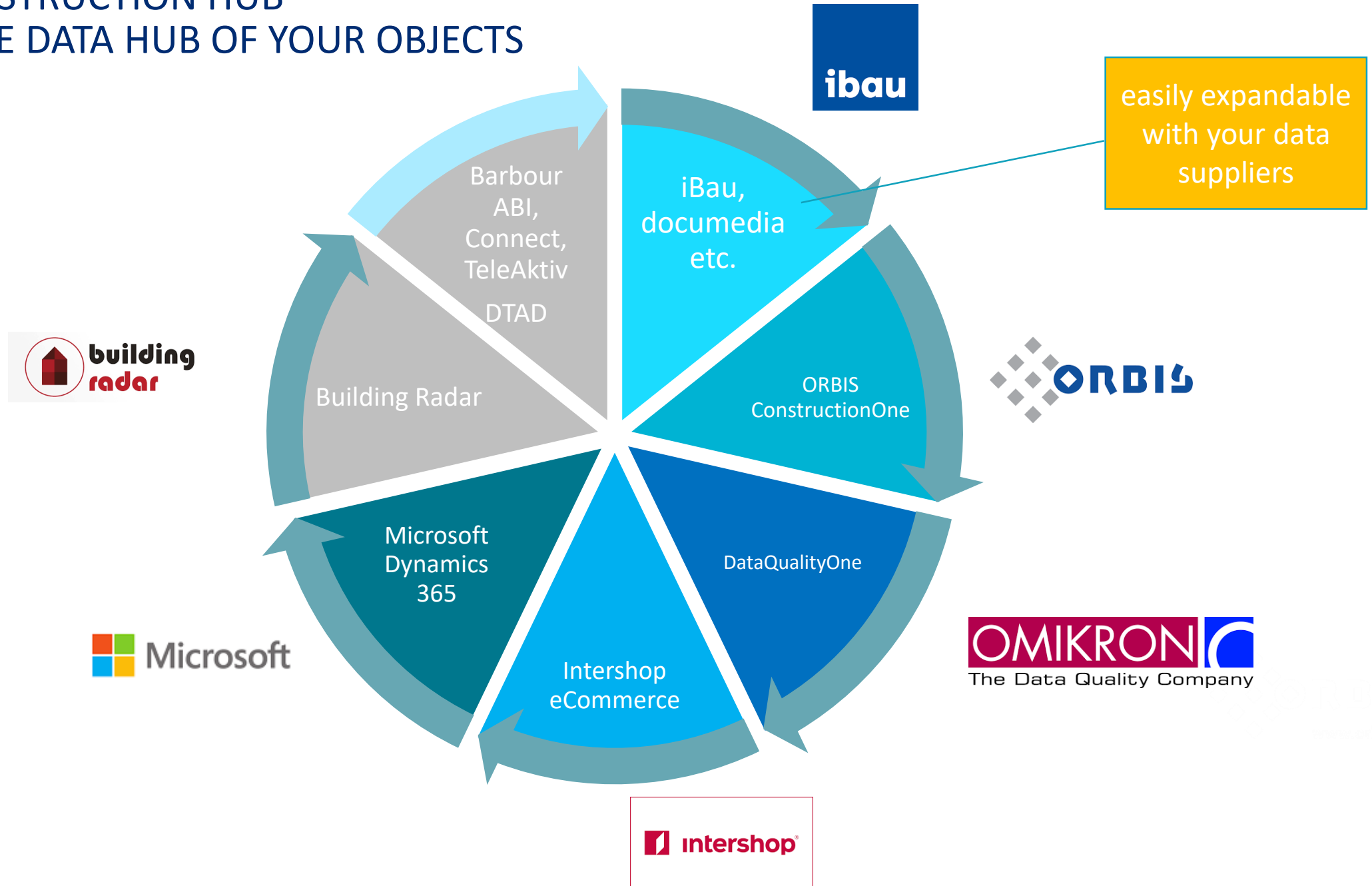
- Duplicate detection
- Create activities

Sales Steering

- scoring
- Potential planning
- forecasting

CONSTRUCTION HUB

THE DATA HUB OF YOUR OBJECTS



THE CONSTRUCTION HUB...



is used to aggregate potential construction objects in the early phases of a possible project initiation.



Identification
Qualification
Decision

THE CONSTRUCTION HUB



is a pre-defined platform that makes it possible to present different tender sources consistently. This leads to a decision-making process of the same consistent quality.

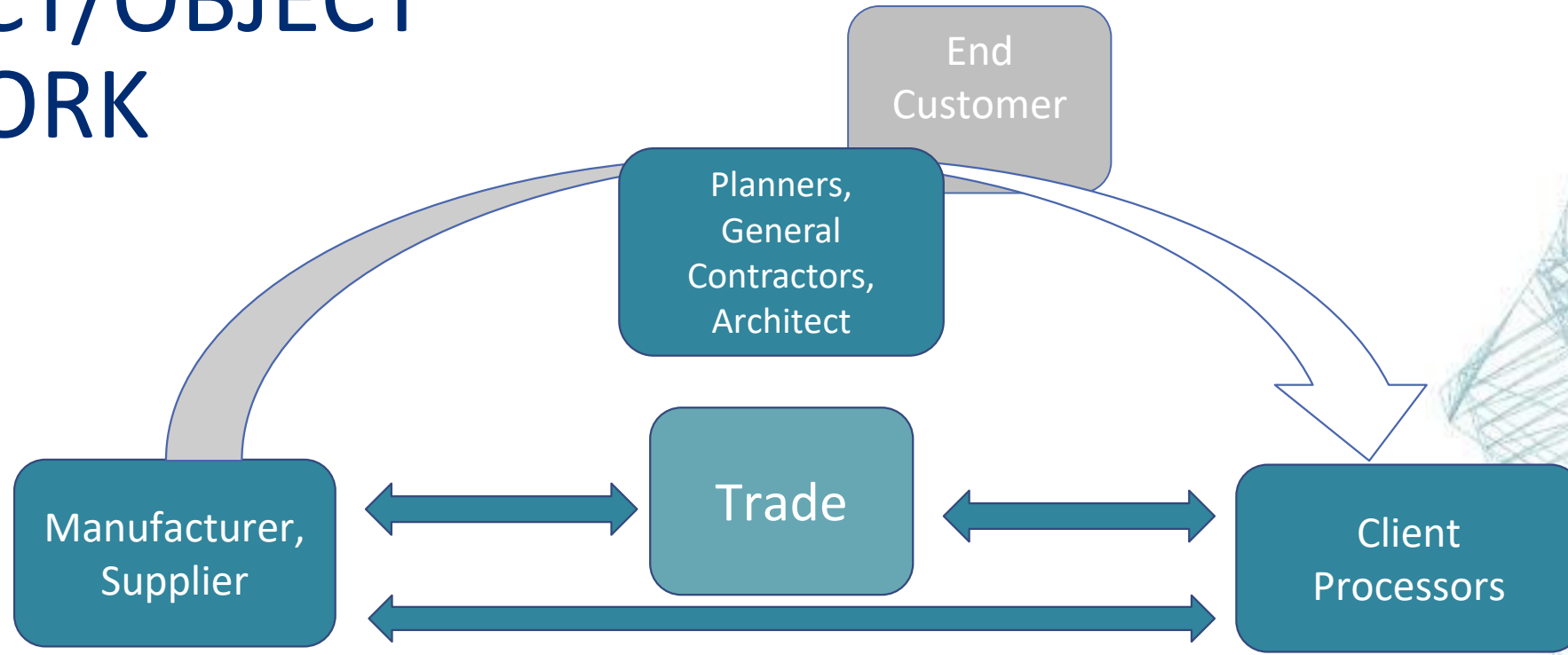


SOURCES

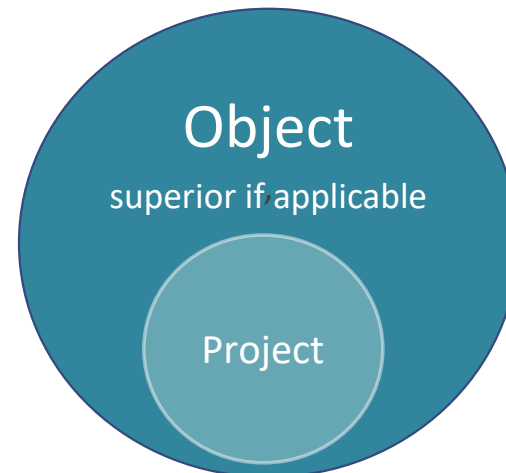
- ibau, Building Radar, DTAD, BarbourAbi, Teleaktiv, documedia, etc.
- Tender platforms
- Excel-based data
- Other sources



PROJECT/OBJECT NETWORK



- Tender
- Specifications
- Enquiries
- Quotations (Supplier, Customer)
- Products, Assortments
- Commissions



- Depending on
- Decisionmakers
 - Influencers
 - Suppliers
 - Clients

PROJECT/OBJECT MANAGEMENT PROCESS



Development Phase

- Identify object
- Determine participants
- Qualifying
- Defining team
- Influence on tender
- Positioning products
- ...

Submission Phase

- Determine and evaluate participants
- Enquiry processors, ...
- Offers from suppliers
- Offer to processors, ...

Renegotiation Phase

- Track offers
- Negotiation
- Contact the participants

Order Phase

- Order
- Lessons learned
- Implementation
- Supervision
- Control

CONSTRUCTION HUB - PROJECT LEAD



Dynamics 365

ConstructionOne Demo Hub

Sales > Project Sources > Kreisklinik Ebersberg – ZNA – Architek...

SANDBOX

Develop Ment

Home

Recent

Pinned

My Work

Dashboards

Activities

Scheduler

Customers

Leads

Accounts

Contacts

Business Cards

Sales

Objects

Projects

Project Sources

Projectparticipatio...

Competitors

Collateral

Quotes

Orders

Invoices

Products

Sales Literature

Service

PROJECT SOURCE

Kreisklinik Ebersberg – ZNA – Archit...

Status Reason

Active

Name

Kreisklinik Ebersberg – ZNA ...

Owner

Develop Ment

General

Source Information

Project Stakeholders

ConstructionHUB

Duplicates

Web View

Source Data

Related

Main Information

Title

Kreisklinik Ebersberg – ZNA – Architekt Referenzn...

Type

tender

Internal URL Full

<https://service.buildingradar.com/leads/LPow>

Language

DE

Source Published Date

2/13/2019

Project

Category

health

Construction Stage

Construction Type

Address

Country

Germany

Continent

Europe

State

Bavaria

Street

City

Ebersberg

Post Code

House Number

Nuts

Latitude

48.07658

Longitude

11.96475

Status Reason

Active

Name

Kreisklinik Ebersberg – ZNA – Architekt Referenzn...

Owner

Develop Ment

Source

Category (Code)

Timeline

Enter a note...

No records to show.



Project Source

- Identify
- Match duplicates
- Qualify
- Decide
- Update or create project

CONSTRUCTION HUB - STAKEHOLDER



Dynamics 365 | ConstructionOne Demo Hub | Sales > Project Sources > Kreisklinik Ebersberg – ZNA – Architek... | **SANDBOX**

Home | Recent | Pinned | My Work | Dashboards | Activities | Scheduler | Customers | Leads | Accounts | Contacts | Business Cards | Sales | Objects | Projects | Project Sources | Projectparticipation... | Competitors | Collateral | Quotes | Orders | Invoices | Products | Sales Literature | Service

PROJECT SOURCE
Kreisklinik Ebersberg – ZNA – Architek...
Status Reason: Active
Name: Kreisklinik Ebersberg – ZNA ...
Owner: Develop Ment

General | Source Information | **Project Stakeholders** | ConstructionHUB | Duplicates | Web View | Source Data | Related

Accounts Overview (Source)

Kreisklinik Ebersberg gGmbH
Contracting authority
Phone Landline: +49 8092 820
Homepage: <http://www.klinik-ebe.de/>

Contacts

Rechtsanwälte Prof. Dr. Rauch & Partner
Email: vergabe@prof-rauch-baurecht.de
Phone Landline: +49 941 2973410
Fax: +49 941 2973411
Address: pfarrer-guggetzer-str. 3
City: Ebersberg
State: Bavaria
Post Code: 85560

dp architekten Greßmann Söllner Partnerschaft mbB
Contract winner
Phone Landline: +49 941 585270
Homepage: <http://www.dpaarchitekten.com/>

Accounts and Contacts (CRM)

Relatio... | Account Name | Primary Contact | E-m

No data available.

Full Name | Account | E-mail

No data available.



Project Source

- Identify
- Match duplicates
- Qualify
- Decide
- Assign or add project contacts

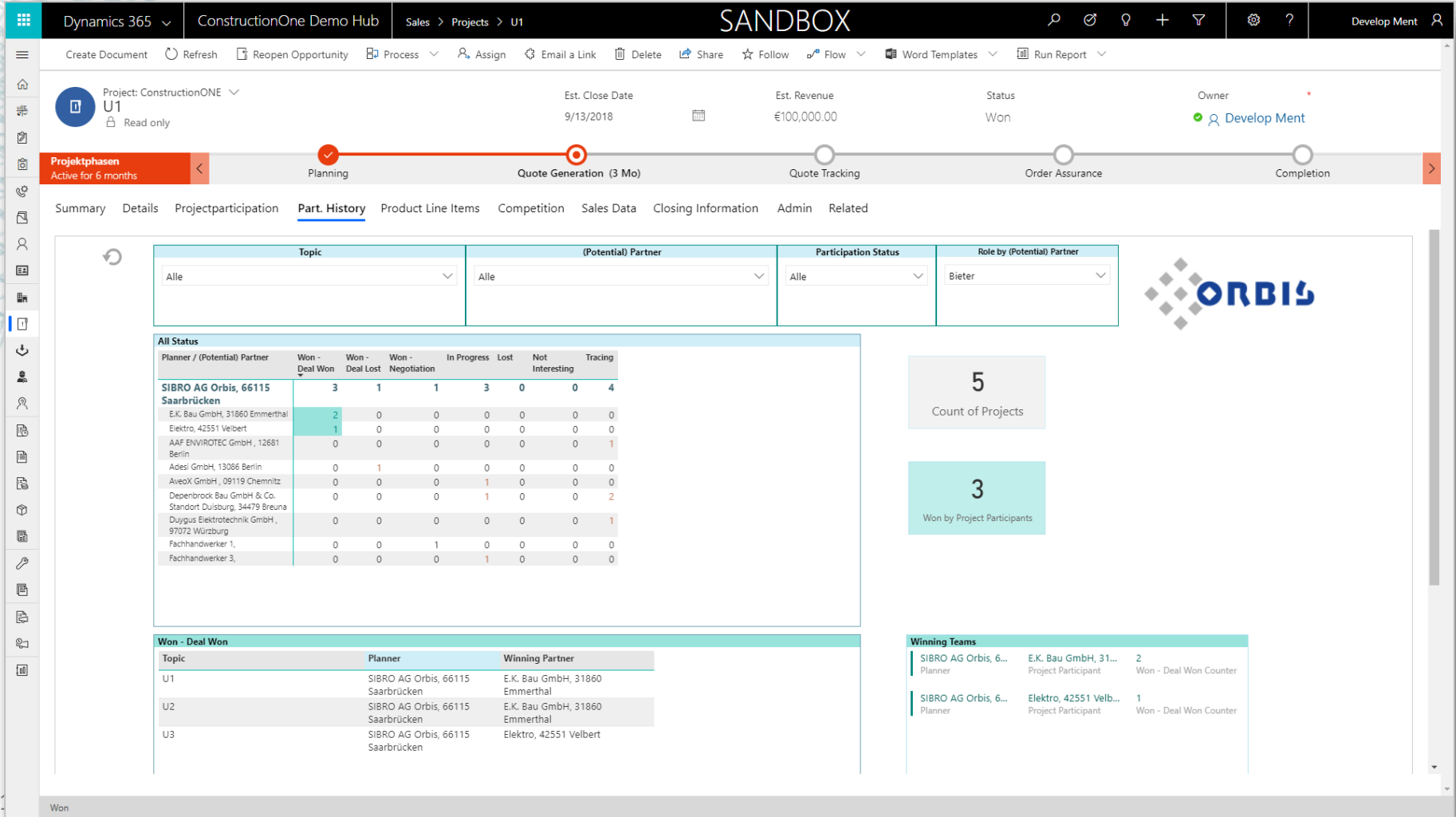


PROJECT



- Object
- Trade
- Planners
- Phases
- Project Contacts
- Team

PROJECT - WINNING TEAM



History analysis

Winning Team

Project contact recommendation

Processor recommendation

PROJECT - PARTICIPANTS/BIDDERS



Project: ConstructionONE
U1
Read only

Est. Close Date
9/13/2018

Est. Revenue
€100,000.00

Status
Won

Projektphasen
Active for 6 months

<

✓

✓

✓

○

Planning

Quote Generation

Quote Tracking

Order Assurance (< 1 Min)

SummaryDetailsProjectparticipationPart. HistoryProduct Line ItemsCompetitionSales DataClosing InformationAdminRelated

+ NEWREFRESHSAVE

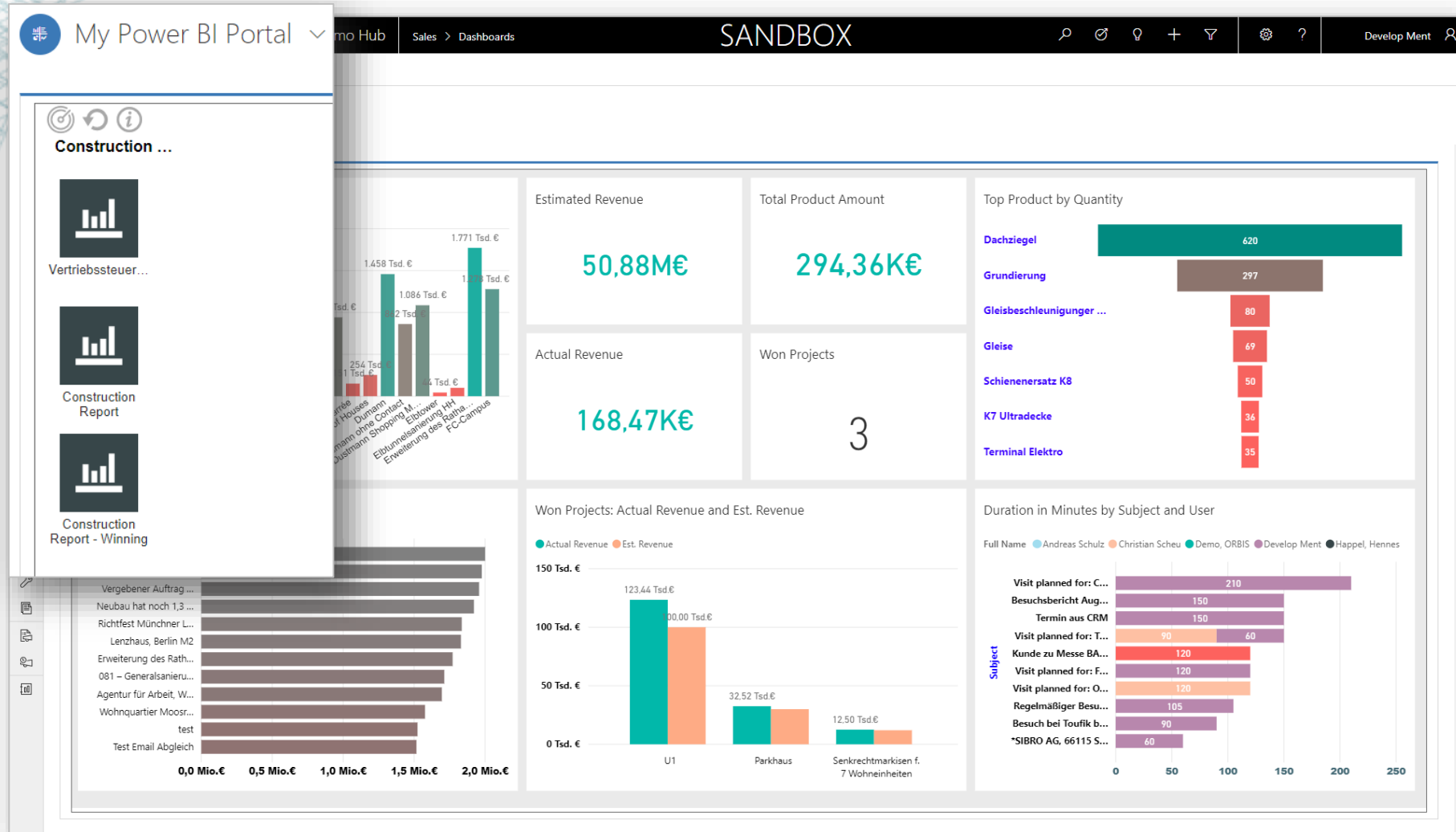
Role	Account	Contact	Participation Status	Priority	Revenue
Bieter (3)					
Bieter	Duygus Elektrotechnik GmbH , 97072 Würzburg		Lost		0.0000
Bieter	E.K. Bau GmbH, 31860 Emmerthal		Won - Deal Won		100,000.0000
Bieter	Deppenbrock Bau GmbH & Co. Standort Duisburg, 34...		Lost		0.0000
Ausschreibender Planer (1)					
Ausschreibender Planer	SIBRO AG Orbis, 66115 Saarbrücken	Oltenau, Nils	Tracing		0.0000



Project Contacts

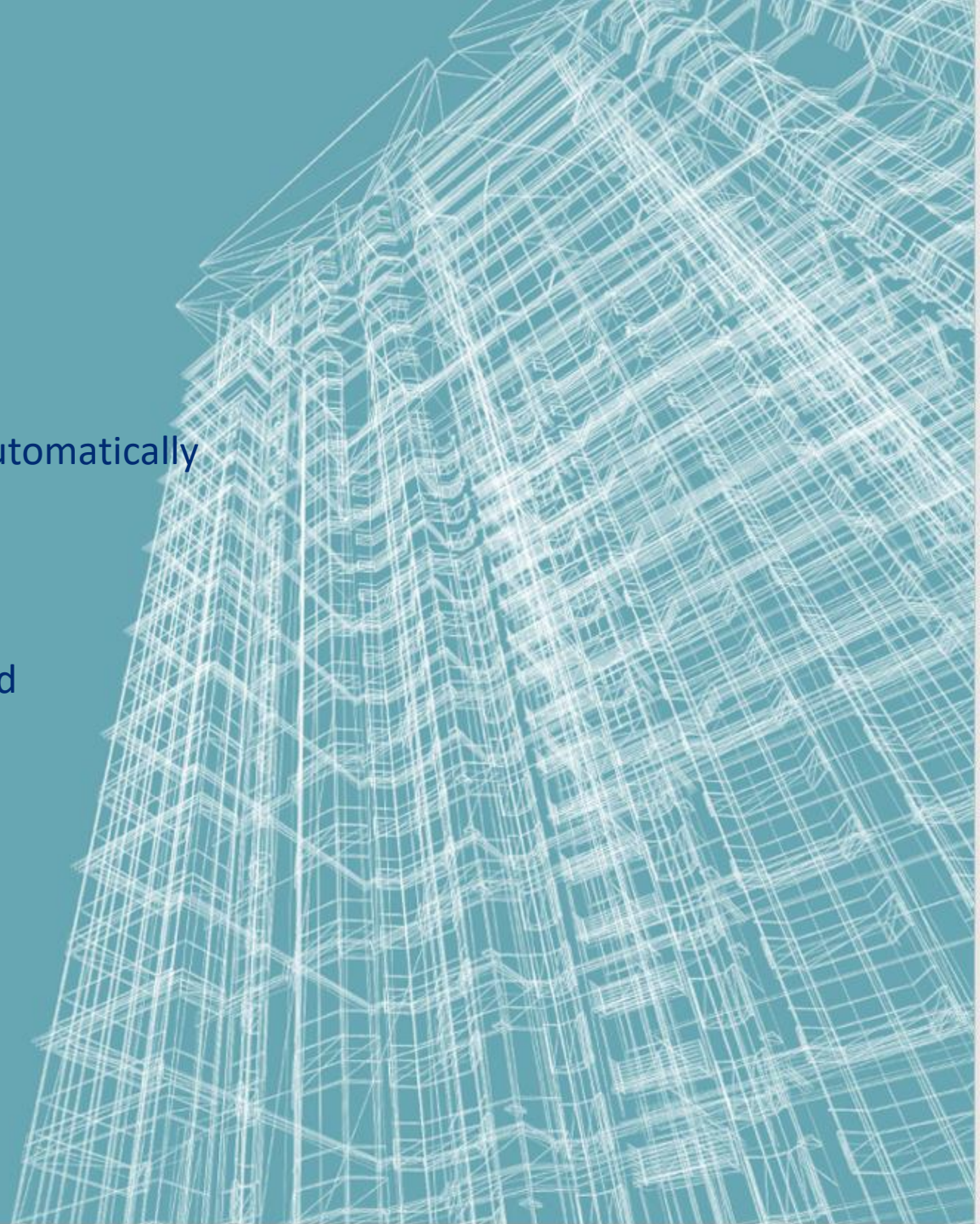
- Planners
- Architect
- General Contractors
- Bidders
- Contacts' Status
- Updated from offer and order

ANALYSIS



SUMMARY

- ◆ Potential objects are automatically added as objects
- ◆ Participants such as customers and contacts are created automatically
- ◆ Automatic supervisor/support assignment possible
- ◆ Automatic duplicate matching
- ◆ Winning team of existing contacts/customers is determined
- ◆ Status of project participants is updated from the supporting documents
- ◆ All KPIs directly available at a glance



STRATEGIC PARTNERSHIP WITH MICROSOFT

Success factors:

- ◆ Many years of experience with the implementation of CRM solutions
- ◆ Highly valued CRM partner (since 2004)
- ◆ Distinct industry focus with own industry solutions (Manufacturing, Construction Supplier, Automotive, Consumer)
- ◆ Highest Microsoft certification levels for our solutions and consultants
- ◆ High SAP/ERP expertise in all areas (R/3, BI, SCM, LES, PLM, CO, FI, ...)
- ◆ BizTalk-PI-Scribe-SSIS Interface Team
- ◆ Our own service center for support
- ◆ Full service CRM provider

2017/2018
INNER CIRCLE
for Microsoft Dynamics

Microsoft Partner
Gold Customer Relationship Management

Microsoft
Partner


2017 Partner of the Year Winner
Germany

ORBIS CONSTRUCTIONONE

Dynamics 365 for Customer Engagement



KERMI



uponor

CRH / Halfen
350 CRM users

hagergroup



Uponor
1,100 users



Hager Group
2,000 users



Sonepar
3,500 users

SANHA
Passt immer.



Wolf Heizung
500 users

ACO
300 users

AGENDA



Introduction

Microsoft Dynamics 365 Platform

Overview of ORBIS ConstructionONE

ORBIS Short Profile & References

Conclusion & Next Steps

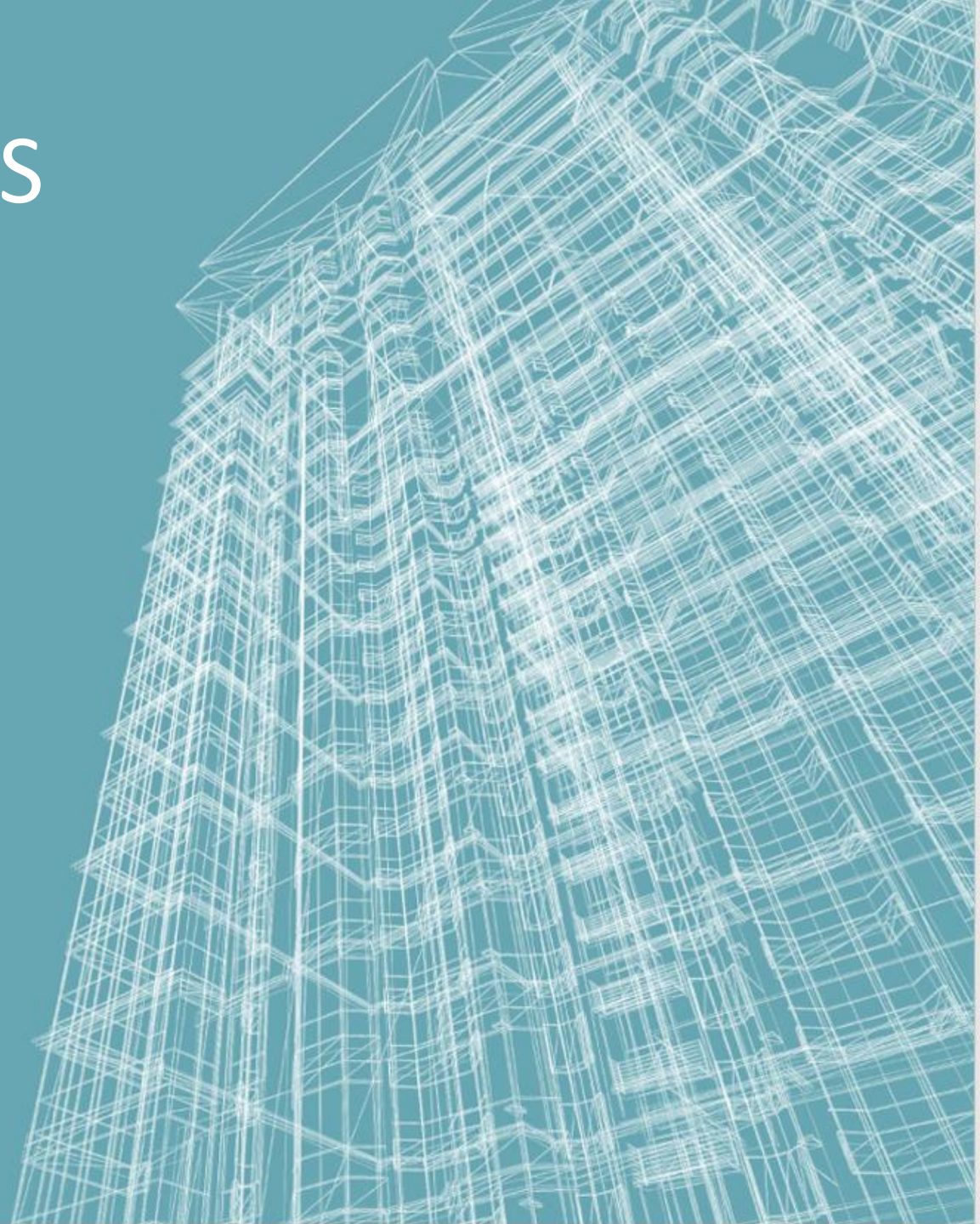
CONCLUSION & NEXT STEPS

1. Presentation meeting

- ◆ Onsite at your offices
- ◆ 2 - 4 hours (consultant and/or account manager)
- ◆ Presentation of Microsoft Dynamics 365 and ORBIS ConstructionONE

2. Scoping workshop

- ◆ Onsite at your offices
- ◆ 2 - 3 days (2 consultants + account manager)
- ◆ (Presentation: MS Dynamics CRM and ORBIS ConstructionONE)
- ◆ Discussion of your core requirements
- ◆ Resulting documents:
Time schedule and initial effort/cost estimate



ORBIS CONSTRUCTIONONE

Dynamics 365 for Customer Engagement

THANK YOU!

