Arbela Technologies case study

JMP digitally transforms with Arbela Data Insights, which uses Microsoft services to strengthen the customer experience and drive more business

Insufficient processes driving the need for digital transformation

To keep up with evolving customer demands, James M. Pleasants Company (JMP) needed to improve selling efficiencies and enhance customer relationship management.

Microsoft Dynamics 365 as the foundation for continued success

Microsoft partner Arbela Technologies upgraded JMP's core platform with a complete stack solution using Microsoft Dynamics 365 and other Microsoft services.

Enhancing customer engagement and empowering sales reps

With its modernized financial and operational procedures, optimized sales processes, and actionable data insight, JMP improved customer engagement.

Microsoft

Helping clients harness technology to accelerate their business

Arbela Technologies is a global consulting firm and Microsoft partner that empowers organizations to digitally transform and grow their businesses. Arbela's expert consultants offer strategic consulting, implementation services, support, and managed services, as well as pre-built software solutions that help clients optimize and innovate using Microsoft Dynamics 365, enterprise resource planning, customer relationship management, business intelligence and analytics, and related Microsoft cloud solutions.

The Arbela Data Insights service, available on [Microsoft AppSource](), is a six-week implementation of a business intelligence and data warehouse solution that uses Dynamics 365, Power BI, Azure Data Factory, and other Microsoft services to turn data into actionable insights.

Improving processes for JMP with actionable data insights that drive deeper customer engagement

James M. Pleasants Company, a manufacturing and distribution business based in Greensboro, North Carolina, recognized the need for digital transformation but was held back by labor-intensive sales processes and insufficient solutions. JMP was reactive in customer service rather than proactive and predictive. The challenge was exacerbated by the company operating in multiple locations across several states, with each field office having its own way of handling processes. Employees had little to no visibility into their quotation and opportunity pipeline, nor data on lost opportunities.

After measured analyses of JMP's goals, market, platforms, and processes, Arbela Technologies designed an enterprise-wide solution to integrate all business processes and data. The solution was built on Azure Data Factory, Power BI, Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Sales, and Dynamics 365 Customer Service. A value mapping was the first step and was done to ensure alignment between Microsoft stack solutions and JMP's strategies and objectives.

Dynamics 365 Finance and Dynamics 365 Supply Chain Management automated many critical steps, and Arbela's pre-built software solutions ensured rapid information sharing and integration across multiple systems and locations. Operational status updates from Dynamics 365 Finance and Dynamics 365 Supply Chain Management are now automatically shown within Dynamics 365 Sales processes to provide a vastly improved customer experience. The integrated enterprise solution empowers sales reps with real-time information they can use to solve challenges, drive upsells, and create a more satisfying experience for every customer.

The new solution enabled JMP to eliminate paper processes and fully integrate and automate the transfer of information. Within the first year of implementing Dynamics 365, JMP has optimized its sales process, resulting from a new digital customer engagement experience and the automation of existing processes. JMP employees now spend less time solving problems and more time innovating new products and services because they're able to act on predictive data rather than reactive data.

> "Moving our business technology to the cloud with Microsoft Dynamics, Azure analytics, and Power BI created the foundation for JMP for long-term success, as we were able to quickly adapt to remote work during the pandemic and turn our data into actionable insight, enabling us to build more effective customer relationships."
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> - Jamie Edmondson, President, James M. Pleasants Company