



Microsoft Dynamics Customer Solution Case Study

Noble Trade

With New CRM Solution, Distributor Improves Productivity and Customer Satisfaction

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Noble Trade is a wholesale distributor of plumbing, heating, and industrial materials. Employees at 22 locations serve the needs of residential, commercial, and industrial contractors. The company lacked a comprehensive CRM tool that would allow employees to keep a close eye on business relationships. Customer data resided with individuals in their heads, Rolodexes, and files. And while corporate systems collected and hosted critical client product-purchase history, account profiles and customer activity history was being lost. To address these challenges, managers selected Microsoft Dynamics™ CRM Online as the company's CRM solution.

Business Needs

Noble Trade is a wholesale distributor of plumbing, heating, and industrial materials to residential, commercial, and industrial contractors. The Canadian firm has 19 locations. Two key factors contribute to the success of capturing and keeping clients: service and pricing. As dedicated as the firm's 317 employees were, there were limits to the efficiency that sales and service personnel could achieve with manual tools.

At the system level, the company lacked a viable CRM solution. Customer data resided on users' local hard drives and in their heads. Communications by e-mail and phone between sales and service people were inefficient. Lacking any sales force automation tools, the firm's salespeople used manual processes. "We wanted to streamline the passing on of information from outside sales to inside sales," explains Deb Thornton, CRM Implementation Specialist for Noble Trade. "There was no consistent method of task assignment and follow up, sometimes causing the duplication of efforts. We recognized the need to implement workflows for sales and service activities."

With no CRM system in place, salespeople also lacked visibility into critical customer activity and purchase history data. Legacy tools made accessing and proactive use of purchase data difficult. This in turn limited salespeople's ability to identify trends that could help them increase sales or counter competitors' inroads.

Original Article can be found at <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000001834>

“ The full marketing, sales and service functionality in Microsoft [Dynamics] CRM [Live] ensures that we cover all the bases with our customers to increase our retention rate.

Deb Thornton
CRM Implementation
Specialist, Noble
Trade

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Solution

Company managers began their research into a CRM solution by reviewing white papers. This led to phone interviews and demonstrations of six alternatives. From these, they narrowed the choices to Sage CRM, Salesforce.com, and Microsoft Dynamics™ CRM Online; they completed a hands-on evaluation of each.

Reviewers considered several key criteria in their selection process. The ease-of-use of the application was important to managers because they recognized that if a CRM solution was cumbersome their salespeople would reject it. The second criterion was full functionality. “We wanted to use the solution out of the box to support marketing, sales, and service systems,” says Thornton. Managers also wanted to use workflows to streamline and automate processes for their sales and services departments.

From an IT perspective, managers mandated a hosted solution so that the company's IT resources would not be burdened. Moreover, the final CRM choice would need to fit with the firm's Microsoft® Office system software, including the Microsoft Office Outlook® messaging and collaboration client. When managers finished weighing the options against these requirements, they selected Microsoft Dynamics CRM Online.

The solution implementation will follow a phased timetable, beginning with the use of the sales module followed by the rollout of marketing and service functionality. “We're customizing an account profile tab to utilize only fields that we want our salespeople to see and fill out,” remarks Thornton.

“We don't have a typical sales pipeline,” explains Thornton. “Our clients are repeat customers and we created a one-year sales cycle to service those accounts. That includes things like frequent segment and commodity reviews to ensure we're in synch with the market and retain customers. We'll use Microsoft [Dynamics] CRM to automate reminders and activities for each of the touch points throughout the year.”

Over the next 12 months, Thornton sees the company's user base growing to as many as 50 people, with 80 percent of licenses dedicated to salespeople and 20 percent to management and administration personnel. Additionally the multi-lingual, multi-currency capabilities of Microsoft Dynamics CRM 4.0 dovetails nicely with the firm's corporate headquarters in Quebec.

Executives plan to integrate the new solution with the company's very robust project quotation software application as well as access data stored in a Microsoft SQL Server® database.

Benefits

Microsoft Dynamics CRM Online solves Noble Trade's major CRM challenges and delivers a single solution for driving sales and service productivity and collaboration.

New solution fuels easy access to, and use of, trending data to retain customers. Salespeople can create ad hoc reports that access customer history data in the company's SQL Server database to identify trends. By gaining granular visibility into account purchases, they can respond more quickly to changes in the marketplace and proactively engage customers.

Sales force automation tools encourage best practices and increase productivity. With Microsoft Dynamics CRM Online, non-programmer managers can place their best practices into workflows. For example, workflows will provide automated tasks and reminders throughout the year for each touch point in the firm's annual sales cycle. This delivers consistent sales activity across the sales force using the company's proven process.

The Microsoft Dynamics CRM Partner Hosted implementation eases system development and provides a standardized solution. Managers avoid solution implementation delays by not having to get on their IT department's project list. As the firm acquires new companies and experiences further growth, the new solution will help prevent the proliferation of data silos by providing a standardized CRM system for new employees.

Sales and Service collaboration increases customer satisfaction. With centrally stored account data, sales and service employees have improved access to data so that they interact intelligently with customers. Salespeople can engage customers while being fully aware of service issues. And by knowing the stage a construction project is in and the specific products customers need, salespeople will be better able to target their sales activities.

