RDM Corp. Rolls Out Microsoft Dynamics CRM to Elevate Customer Satisfaction

Overview

Country: Canada
Industry: Technology/Finance

Customer Profile

Waterloo-based RDM is a market leader in the small document imaging, image processing and payment processing industries and provides hardware, software and service solutions for markets where imaging is a critical business need.

Business Situation

As customer service is top priority for RDM, the company needed a Web-based solution to track and respond to customer requests that also allowed for customer self-service.

Solution

Working with Microsoft Gold Certified partner Brodie, RDM implemented Microsoft Dynamics CRM together with c360's Email To Case and Customer Portal to meet its customer needs.

Benefits

- Ease of use and integration
- Real time reporting made easier
- Increased customer satisfaction
- Ability to meet and exceed Sarbanes Oxley/SAS70 requirements

> "With a Microsoft Dynamics CRM solution you have a technology that actually works with your business instead of having to change your business to fit the technology."
>
> Barb Cummings, Director of Business Development, Brodie.

Since opening its doors over 15 years ago, Waterloo, Ontario-based RDM Corp. has become a market leader in the document imaging, image processing and payment processing industries. The company provides hardware, software and service solutions for electronic cheque conversion, bill payment processing and other markets where imaging is a critical business need. RDM needed to upgrade its existing technology in order to meet Helpdesk customer satisfaction needs, and worked with Microsoft® Gold Certified Partner Brodie Computes Inc. to implement Microsoft Dynamics™ CRM. Today, satisfaction for RDM customers is at its highest level.

Situation

There is an old adage that the customer is always right, and for Waterloo, Ontario-based RDM, it is a business rule to live by. For over 15 years RDM has provided innovative solutions that make the production of cheques and document processing more efficient and cost-effective. The company is a market leader in the document imaging, image processing and payment processing industries and has set the standard in the Magnetic Ink and Character Recognition (MICR) quality assurance market. RDM provides hardware, software and service solutions for electronic cheque conversion, bill payment processing and other markets where imaging is a critical business need.

After evaluating customer satisfaction levels, RDM found that faster response times and more frequent and increased communication were critical factors. To ensure the company was fully meeting customer expectations in these areas, RDM decided it was time to upgrade from its existing Sage Accpac CRM technology.

"Accpac CRM was a nice-looking product, but it was very difficult for us to get the kind of reporting we needed out of the system," says Eric Morin, Director of Operations, RDM Corp. "With Accpac CRM, we had significant issues with user adoption, and the system wasn't flexible enough to handle our specific business needs." As well, the Accpac-based system restricted users to tracking case numbers and taking notes.

"There was no escalation built in. Customers who called into our Helpdesk were given a case number and then would need to call us back if they wanted status on their requests. Customers had no visibility into the status of their cases, and as a result they were not aware of how diligent we are with each and every incoming request," says Morin. "We needed a solution that could not only help us

escalate requests, but also one with which customers could track progress online without queuing on the phone or waiting for a call-back."

Solution

To help provide staff with an effective customer tool, and drive even higher levels of customer satisfaction, RDM decided to evaluate Microsoft Dynamics™ CRM. The company was already using Microsoft-based software, including Microsoft® Office Outlook® messaging and collaboration client. Because of that familiarity, RDM knew the solution would not cause any user frustration as the interface was easy to navigate. RDM enlisted the help of Brodie Computes to bring Microsoft Dynamics CRM into its Helpdesk department.

"Microsoft Dynamics CRM works with existing business processes. In our experience, companies using it don't have to make adjustments to fit the technology," says Barb Cummings, Director of Business Development, Brodie Computes. "It offers the kind of flexibility that customers are looking for, and it gives us the capability to address complex business requirements with much less effort than other products."

Right out of the box, Brodie was able to get RDM staff up and running on Microsoft Dynamics CRM, and was able to customize screens for the Helpdesk easily and without incurring significant additional costs. Because RDM was also looking for a means to provide customers with self-service, Brodie implemented c360's CRM customer portal add-on, enabling customers to log onto a portal and view actions, notes and the latest progress related to their request.

"The initial deployment only took one month. Rather quickly thereafter, we started to add other pieces so that we could bring in other RDM operational groups like Problem

Management and Incident Management," says Morin. "In all of these areas, the integration with other Microsoft software made it easy for all of our staff – and our valued customers – to use."

Benefits

A year after the deployment of Microsoft Dynamics CRM, RDM is realizing a range of benefits that are aligned with its original goals.

Increased customer satisfaction

After increasing its user adoption, increasing customer satisfaction was an absolutely critical business benefit that RDM was looking for from its new Microsoft Dynamics CRM solution. The company's customers were unhappy with Helpdesk response times, and much of this stemmed from having no visibility into RDM's case and tracking process.

"Business cases for technology upgrades generally focus on dollar figures and ROI, but in our case, customer satisfaction is everything - it's about ensuring our customers know they are our top priority and that we are assigning the appropriate severity and priority to their requests," says Morin. "With the winning combination of an internal CRM solution and the customer-facing self-service portal, our customers are happy and we're getting feedback that our customer satisfaction with response and workaround times has much improved. At the end of the day, customer satisfaction is the best ROI we can garner."

Ease of use and integration

Even the best software is of little value if it isn't being used. With Microsoft Dynamics CRM, RDM has realized its goal of 100 per cent user adoption.

"Right from the beginning our staff found the user interface extremely intuitive, and we required little to no training," says Morin. "Our customers, who do not work for a technology company, also provided great feedback about the ease of use of the self-serve portal."

In addition, the simple integration of Microsoft Dynamics CRM with existing RDM technologies is a major benefit. The new customer process starts with RDM receiving an alert from its Windows SQL Server™ 2005 database software, which is then routed to Microsoft Operations Manager and then routed to an email address via Microsoft® Exchange Server 2003. From there the email is processed by c360's Email To Case service and a case is automatically created in Microsoft CRM and placed in the appropriate CRM support queue.

"With this Microsoft integration, our staff can then look at the case, look at the environment, and then resolve the case. Once resolved the case leaves the queue and as a result does not get escalated," says Morin. "However, if the staff member didn't look at it, if they didn't take care of the issue, then the CRM built-in escalations take effect and we take action. The Microsoft technologies all integrate so well that the entire process is seamless and almost effortless."

Reporting and Dashboarding made easier

One piece missing from the previous Accpac CRM solution was the ability to generate live reports and a custom dashboard. Since implementing Microsoft Dynamics CRM, custom dashboards are easily migrated to Microsoft® SharePoint® portal servers and reporting has become a reality - available in real-time and customizable to the company's business needs.

"Now our reports can provide specific information on everything from price points to the business size of our target customers –

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and it's always beneficial because it is always up-to-date," says Morin.

Additionally, "The integration between CRM and SharePoint is a boon for RDM," says Cummings. "With a Business Intelligence dashboard, Eric now has real-time insight into vital customer service level data and can troubleshoot problem areas as they occur."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:
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