

# Building Materials Product Manufacturer Automates Business Processes by Implementing Microsoft Dynamics CRM Online

**Customer:** Champion Windows

**Size:** > 2,000 employees

**Region:** USA

**Industry:** Manufacturing and Distribution

**Profile:** Champion Windows (Champion) is a leading manufacturer and marketer of windows, doors, sunrooms, and roofing and siding products for home and corporate improvement projects

**Services:** Microsoft Dynamics CRM Online

## Business Needs

Operating in more than 77 locations nationally, Champion relied heavily on paper-based and manual processes to manage their marketing, sales, and service activities. In addition to this, their sales and installation teams lacked an information management tool to record, organize, and consolidate information related to prospects and customers. Unfortunately, this led to problems such as data inconsistencies, operational inefficiencies (due to lack of visibility in sales, service, and marketing activities), and difficulties in analysing customer interaction.

The manufacturer required a solution that could automate business processes, handling everything from marketing to service, and streamline and standardize the workflows associated with sales and installation.

After exploring several options, Champion decided that Microsoft Dynamics CRM was an ideal fit for their needs. Implementing Dynamics CRM at their organization, would allow them to integrate it with their already existing Dynamics AX solution.

Champion was in search of a Microsoft Partner with in-depth Dynamics CRM experience to help them with implementation.

## Solution and Approach

After reviewing several CRM partners, Champion decided to partner with Synoptek for their Dynamics CRM implementation.

Synoptek (formerly Indusa) developed an easy-to-use, mobile-ready business management portal for Champion using Dynamics CRM Online to automate and enhance their business processes and provide a centralized database that is shared across the entire organization.

The key components of the solution are:

- **Administration module** – Administrative data is inserted, modified or deleted using this module. The admin defines organization and business units, users and creates roles for the users, products and product warranties, finance company details, and territories.
- **Sales module** – Leads, quotes, customer accounts and contacts, and sales orders are handled using this module. It also assists with planning and managing sales activities effectively.
- **Marketing module** – This module enables Champion to plan, execute, and measure campaigns across channels, manage email marketing, and create static and dynamic marketing lists.
- **Field service module** – A field service management tool integrated with CRM Online, provides a robust set of features, which includes

work order management, case management, contract management, resource management, and an appointment calendar.

- **Integration with website** – The CRM Online system is integrated with manufacturer’s standalone website through web services. When a website visitor registers for a product or service via online booking wizard on the website, the data is fetched to the CRM system. Based on the visitor’s request for a particular product/service required at particular area, and resource availability, data is sent back from the CRM system and displayed on the website.

The solution automates the sales and installation workflows which previously followed a paper-based approach. Sales reps and installation technicians are provided with the necessary tools to manage each stage of the sales and installation cycle respectively – from introduction to closure.

The existing Dynamics AX system of Champion was seamlessly integrated with Dynamics CRM Online using web services.

## Business Results

Automating business processes with Dynamics CRM Online implementation helped the manufacturer significantly improve their operational efficiency and

business productivity. They now have clear visibility into the status and progress of every process. There is no need for employees to spend time on slow, structured, manual processes; instead, they can focus on core business activities.

Targeted marketing campaigns in Dynamics CRM Online helps Champion promotes their business. Sales people have essential insight and tools with which they can focus on the right customers. Field service capabilities helps Champion manage and streamline field agent activities with its out-of-the-box features.

The Dynamics CRM and AX integration provides Champion a single repository for all their business and customer information. Increased visibility using the combined systems allows them to interpret customer buying preferences, patterns (CRM), and payment history (Dynamics AX).

Dynamics CRM Online implementation provides Champion a comprehensive marketing, sales, and service management tool that enables them to transform data into actionable results. With the accessibility of crucial information on the go, they are able to improve business strategies and strengthen relationships with customers.

## About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum “business value” to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.