

Glass Tableware Manufacturer Improves Customer Focus and Increases Sales Productivity by Implementing Dynamics CRM Online

Customer: A leading producer of glass tableware products

Size: > 6,500 employees

Region: USA

Industry: Manufacturing and Distribution

Profile: The client designs, manufactures, and supplies glassware, tableware, and flatware to a broad group of customers in the foodservice, retail, and business-to-business markets.

Services: Microsoft Dynamics CRM Online

Business Need

As a leading glassware manufacturer and tableware supplier, Synoptek's client was experiencing rapid business growth and global expansion. They required a tool which could provide a holistic view of the prospect/customer lifecycle, help the sales team manage customer requests effectively and in a timely manner, and allow them to focus on the right opportunities to close deals quickly.

After analyzing various customer relationship management (CRM) solutions, the manufacturer decided to implement Microsoft Dynamics CRM Online as a comprehensive sales and customer service tool, to enable their sales team to quickly and efficiently access – and act on – crucial data to improve customer service efforts and increase productivity.

Solution and Approach

Considering the manufacturer's primary objectives, Synoptek (formerly Indusa) implemented Dynamics CRM Online utilizing the Sure Step Project Methodology.

The system focuses on core sales force automation functions. Some of the key functions are:

- **Account Management** – Enables sales to:
 - Track all accounts and related contacts, opportunities, and cases

- Generate quotes, sales orders, and invoices for accounts

- **Contact Management** – The sales rep gets a complete view of customers, including activity history, key contacts, and communication.
- **Lead Management** – Sales can manage leads through the entire sales cycle, from identifying leads to converting them into opportunities.
- **Opportunity Management** – Allows sales to easily manage sales deals. They can associate opportunities with accounts, contacts, and activities and have better visibility into opportunities.
- **Territory Management** – Sales can segment and organize customers; develop and preview multiple territory strategies and use the one that works best.
- **Campaign Management** – Sales can easily plan, execute, and measure campaigns from start to finish and effectively deliver the right message to the right people at the right time.

- **Competitor Management** –

This helps the sales person to learn about the competitive landscape in terms of assessing the company's value and its competitors' value from the customer's point of view.

- **Goal Management** –

Helps to set monthly/fiscal goals for each sales person.

Integration with JD Edwards:

The Account, Orders, and Invoice modules from JD Edwards were integrated with Dynamics CRM Online, allowing direct access to data as well as building a more comprehensive picture about a particular customer.

Integration with Process Maker:

Dynamics CRM Online integration was carried out with a third-party tool, Process Maker suite, enabling accounts created in CRM to be integrated as a Process Maker account.

Outlook Integration:

To use Dynamics CRM features from Microsoft Outlook, Microsoft's Outlook integration tool was installed and configured. This allows the team to continue to work directly from their email and be able to record customer activity in the CRM at the same time.

Web link Integration:

This included:

- LYNX Reporting
- EPIQ
- RAPID

- GOLD Reporting
- PDPnet
- PromoTracker

Dashboards:

Personal and managerial dashboards were developed to manage sales, goals, opportunities, and activities.

Business Results

Since all the customer-related data is stored in Dynamics CRM Online, it helps the manufacturer to analyze the needs of customers and even anticipate their problems – all at the right time.

With the intuitive and easy to use functionalities of Dynamics CRM Online, sales reps can see all their accounts, contacts, opportunities, and tasks, in a single place. This helps them better manage activities and prioritize tasks to make sure customers are not ignored and the key prospects are contacted on time.

Integrating Dynamics CRM Online with JD Edwards and Process Maker helped the manufacturer streamline business processes and improve access to critical information.

Implementing Dynamics CRM Online has indeed helped the manufacturer evolve as a customer-focused brand by providing improved visibility into customer information. In addition to this, the CRM has proved to be a vital tool to boost the performance of the sales team by enabling increased connection and collaboration so they can close more deals, faster.

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.